Call- & Track 5.1

User Helpdesk & License management

User Manual

For a Quick start!

MASCH
Software Solutions

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2 preliminary remarks

Welcome to the current version of Call & Track, the Helpdesk and license management-software for service agents. With the new functions in Call & Track systems speak the same language; Service agents have any time access to current information and can call in worldwide, teams can cooperate and carry out the coordination together independent of their working place. Single functions, such as the on-line access are not available in all versions of Call & Track.

Call & Track offers new functions and technologies which support service agents and companies in the following areas:

- **Management of information:** The transmission of relevant and topical information to service agents out of Call & Track is facilitated by the comprehensive implementing of practical standards, by integrated areas for the investigation and communication as well as by enlarged reporting functions. More over Call & Track offers a platform for process solutions in companies which allows also company specific and therefore individual extensions.
- **Helpdesk and service management:** Call & Track enables communication between various platforms. Accordingly familiar Call & Track information can now be activated for the access on complex Back-End-data storage devices without immense adaptation costs. Call & Track shows therefore data which are stored on desktops and servers, so that Service agents can use this information to the benefit of the organization.
- **Use of information:** Extensive evaluation-reports are available to the analysis and documentation of the whole Helpdesk and license amount, the performance of the agents as well as product analysis,

quality analysis and structural analysis. Individual extensions for analyzing the data are optional here as well.

- **Protection and control of information:** The Helpdesk and license management software allows the proactive control of the distribution of propriety information, by preventing that unauthorized service agents can use the data. The information reaches exclusively the desired destination.
- **Efficient Teamwork:** The central supply of data, allow service agents mutual use and access of relevant information, working in real time with immediate reciprocal access even if there are geographic borders.
- **Coordination and Organization:** Common used structures, rules and data information support service agents with the administration and organization of projects, information and tasks.

2.1 Helpdesk engineers today

Nowadays more service agents than ever use software tools to process information. OOO MASCH Russia has examined Helpdesk engineers and their working customs, ergonomic requirements, frequent routine tasks and a lot more to determine how service agents use the applications in the company really. With the design of Call & Track OOO MASCH has seen and taken into consideration the following challenges with which Helpdesk engineers are principally confronted:

- **Tiredness of information:** Often too many information exists at too many places and service agents cannot process this flood of information. Call & Track offers new procedures how service agents remain organized and keep the overview.
- **Ineffective collaboration:** Scheduling and communication usually require extensive, mutual interactions, even though service agents in other locations cannot be reached easily. Till present collaboration technology was difficult to start if no extensive infrastructure was furnished. Call & Track offers an efficient tool for the collaboration above a user-friendly user interface to the service agents and allows, in addition, a seamless communication.
- **Isolated data:**During several years of technology innovations, mergers, company buyers and other factors have ended in the result, that a large volume of company data are stored in different data bases and software application like on separate "islands". Call & Track is the solution for the helpdesk and license management which entirely supports the service agents according to practical standards and user-defined patterns and therefore offers a simplistic procedure for connecting systems of information in order to make these data available for the service agents again.
- **Missing integration of commercial process:**Call & Track can support companies with the construction of new, simple and efficient

trials for everyday commercial functions, as for example by the management of users, products, licenses, serial numbers and many more. All Service agents are integrated and shoving information back and forth becomes superfluous.

- **Simple use:**Call & Track offers new features and technologies which were conceived for an even easier use of the product, especially in team oriented environments. Companies will probably find out that they can use these functions for solving commercial problems, which seemed to be insoluble.

2.2 integrated collaborations

On-line collaboration can accelerate the marketability and allow an organization additional flexibility while reacting to sales opportunities. Call & Track was designed in view of the collaboration via Intranet and offers new ways to connect the individuals, teams and organizations. The application allows the collaboration from every place, accelerates procedure and the supply of new information.

2.3 advantages for little enterprises

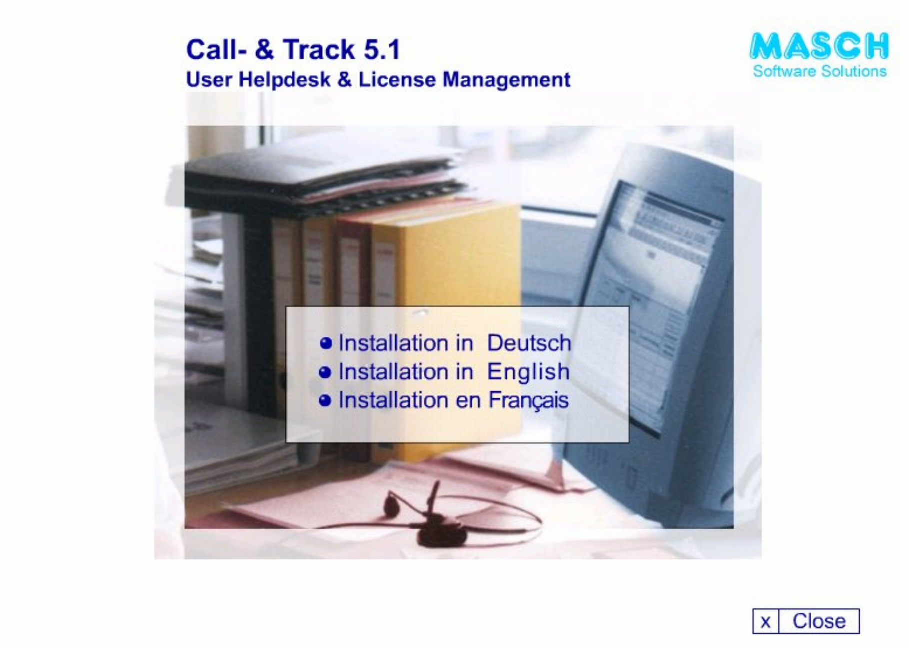
Many of these Call & Track Track-Features were designed for single workstations as well as for small companies concerning collaboration, efficiency and management of information. Other versions from Call & Track contain further features which support middle and bigger enterprises.

3 Installation

3.1 Insert the Program CD

The user interface of the Call- & Track Software is multi lingual available in German, English and French language.

After inserting your Call- & Track 5.1 Program CD the multi lingual installation program will be launched automatically.

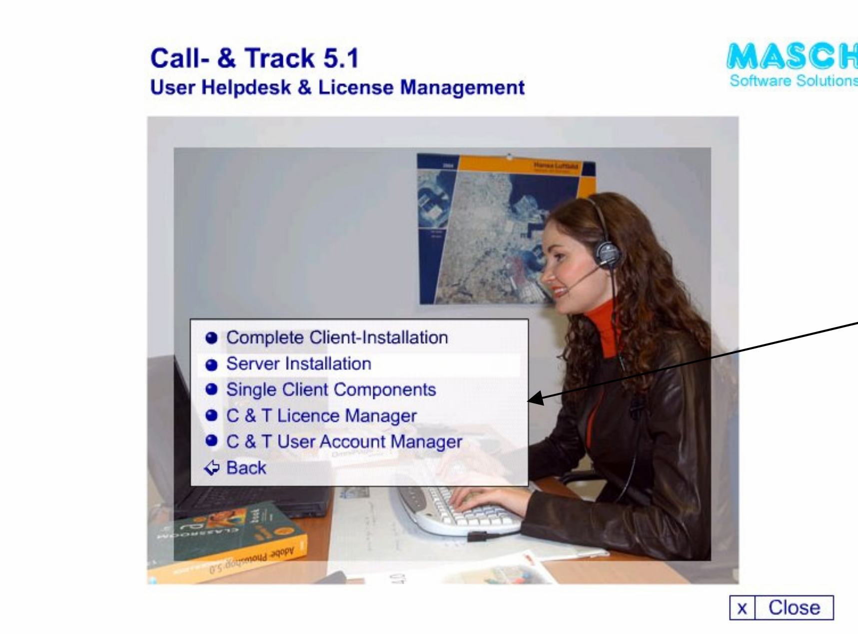


The chosen installation language will be used as default language at the first launch of the software application. But you can change the user interface language at every time; you might need to do so. You can change later on the user interface language through the option “*Local Setup*”.

Please choose now your preferred installation language by clicking on the menu option with your mouse.

3.2 Installation in English

After selecting the option "*Installation in English*", you will see the following screen:



You have now the choice to select one of the following options:

"*Complete Client Installation*"

Or

„Server Installation"

Or

„*Single Client Component Installation*"

Or

„C & T License and User Account Manager"

Before you start installing Call- & Track Software, please start the installation of Microsoft SQL 2000 Server including Service Pack 3a or later and read the important information.

You require, based on the Call- & version, which you have purchased the following database server from Microsoft:

- **Call- & Track 5.0 SMB Edition**
  The complete installation from Microsoft MSDE 2000 is required

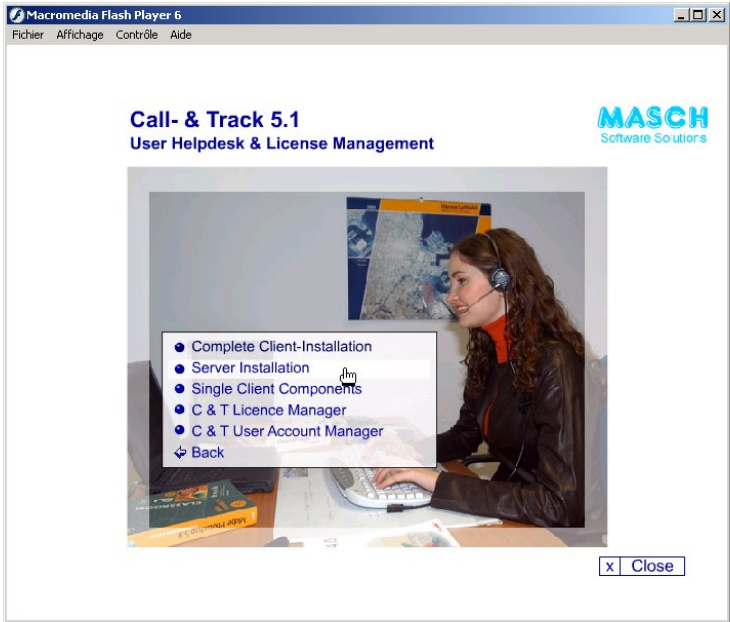
- **Call- & Track 5.1 NETWORK Pro Edition**
  The complete installation of Microsoft MSDE 2000 or Microsoft SQL 2000 Server including Service Pack 3a or later is required

- **Call- & Track 5.2 ENTERPRISE Edition**
  The complete installation of Microsoft SQL 2000 Server including Service Pack 3a or later is required

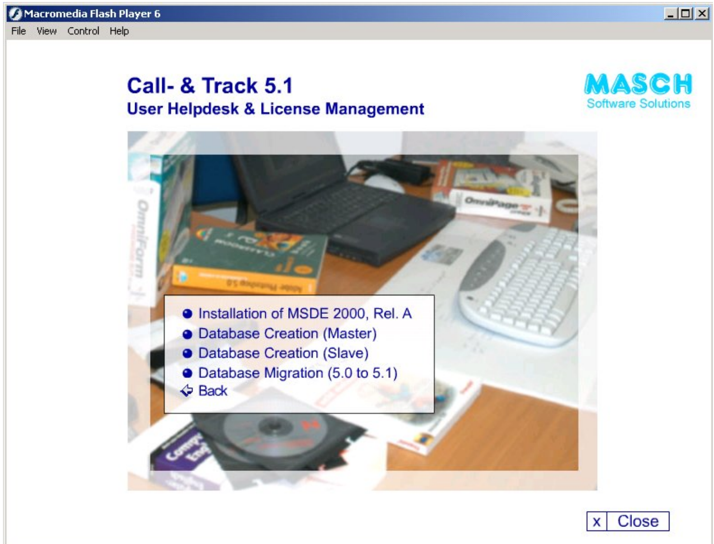
You might install Call- & Track only, after you have successfully installed the required Microsoft MSDE 2000 or Microsoft SQL Server 2000.

The MSDE 2000 software from Microsoft does not include the standard SQL Server Management Tools, as you might know it from Microsoft SQL 2000 Server product. All information regarding the license free download and installation of MSDE 2000 are included within the installation notes.

3.3 Server Installation of Call- & Track



After choosing the server installation you will get the following screen:



Here you can choose between Microsoft MSDE 2000 Rel. A Installation, Master and Slave Database Installation as well as Call- & Track Database Migration from v5.0 to v5.1.

3.3.1 Microsoft MSDE 2000 Installation

The Installation of Microsoft MSDE 2000 (without Enterprise Manager) needs to be done only than, if Microsoft SQL Server 2000 (with Enterprise Manager) has not been installed. If Microsoft SQL Server 2000 has already been installed, you need to indicate the installation path on the server. Otherwise the installation of Microsoft MSDE has to be processed on the server.

After starting the Microsoft MSDE 2000 installation the following screen comes up prompting you to indicate the server administrator password:

Installation Information

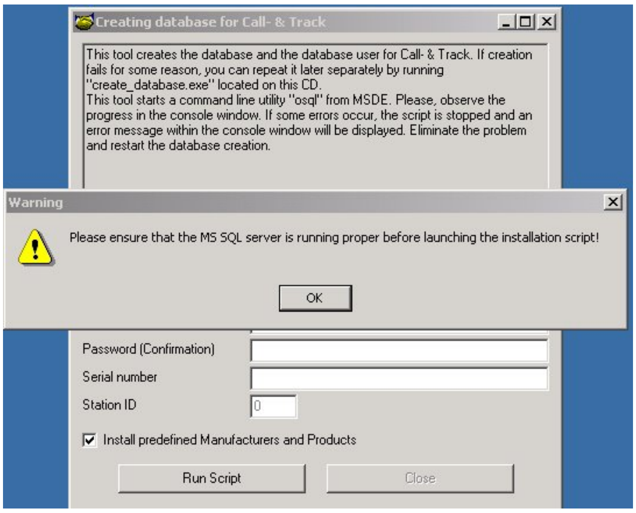
Through clicking on *Installation Notes* you will find the info file regarding the installation of „Microsoft SQL Server 2000 Desktop Engine (MSDE 2000), Version A“.

Start Installation

After inserting the password and confirming it the installation will be started by clicking on *Start Installation.*

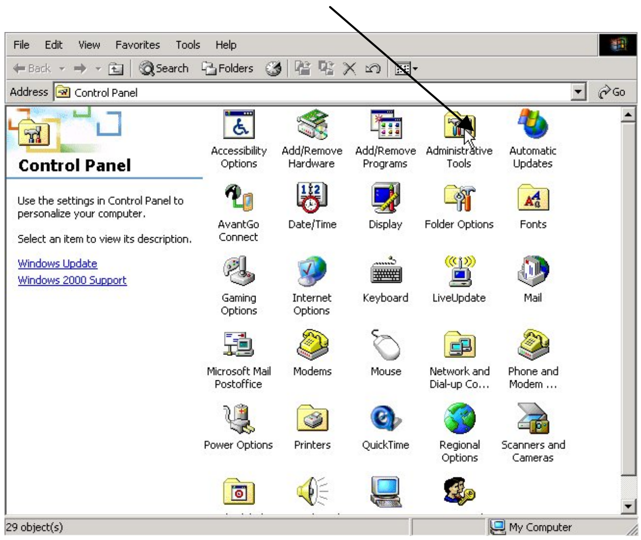
3.3.2 Installation of the master database for the local network

The installation of the master database will lead from the Client (Work Station). On choosing the menu *Database Creation (Master)* you get the advise to check the fully started MS SQL Server.

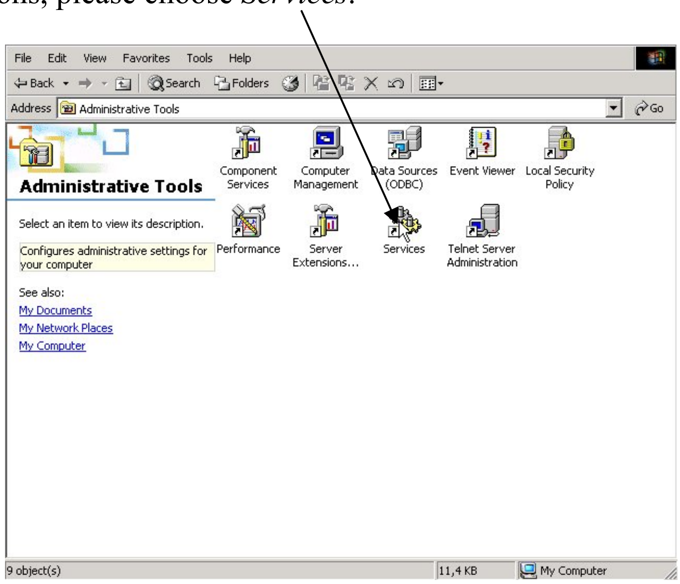


3.3.3 Start of the MS SQL Server

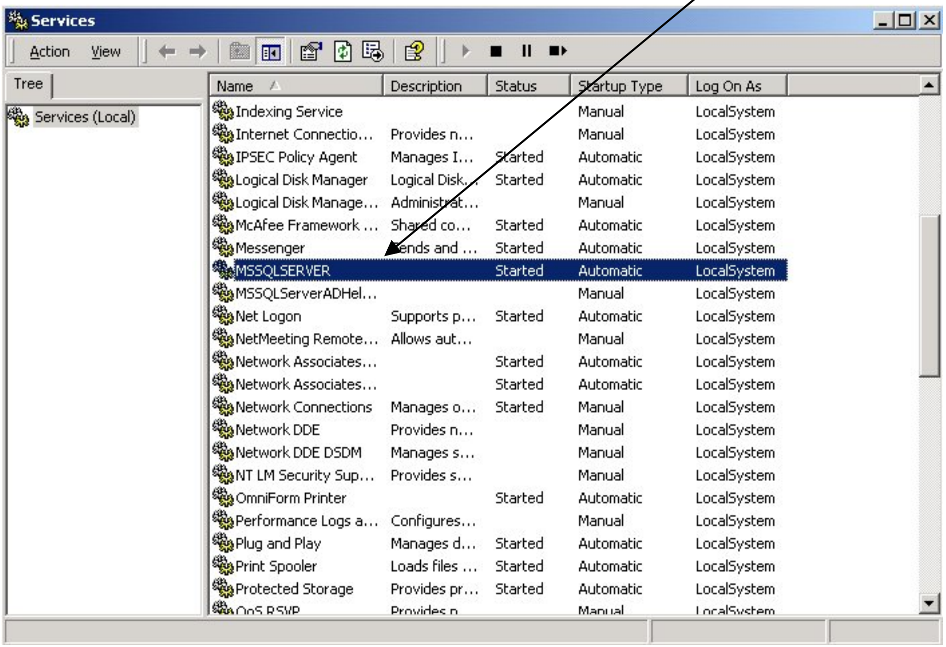
Make sure that the MS SQL Server 2000 or the included MSDE 2000 has been started. Therefore you choose for example *Control Panel* throughout the button *Start* and click on the button *Administrative Tools.*



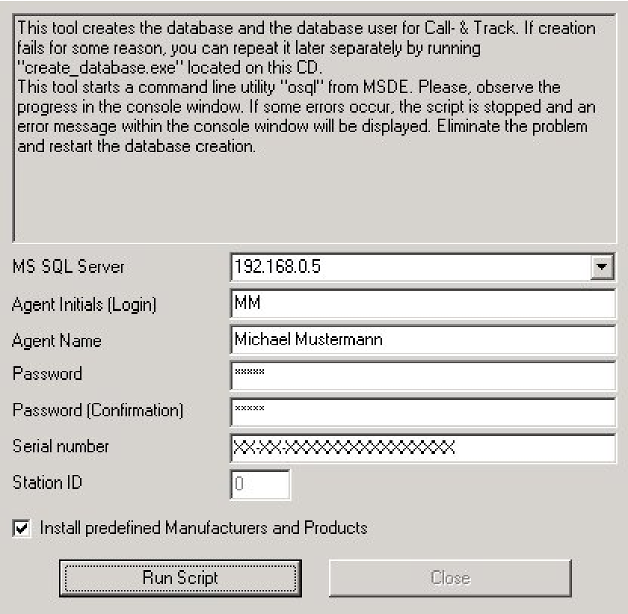
From the options, please choose *Services*.



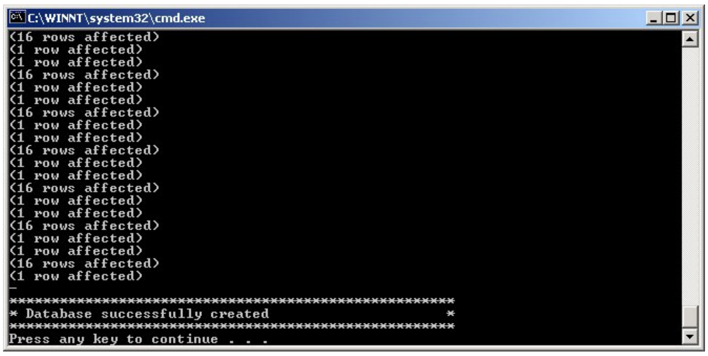
In the following screen just behind the service *MS SQL Server,* the status "Started" and as start-up type "Automatic" will be listed.



It is essential to insert the necessary data before running the script. These data include the TCP/IP address of the MS SQL Server, the agent initials, the agent name, the password and its repetition as well as the serial number of Call & Track. The station ID cannot be changed in here. Please note: Choosing *Install predefined Manufacturers and Products* (sample/ model database) cannot be cancelled and therefore uninstalling afterwards is impossible.



The script will be carried out in a DOS window, if necessary the authentication of the script has to be activated.



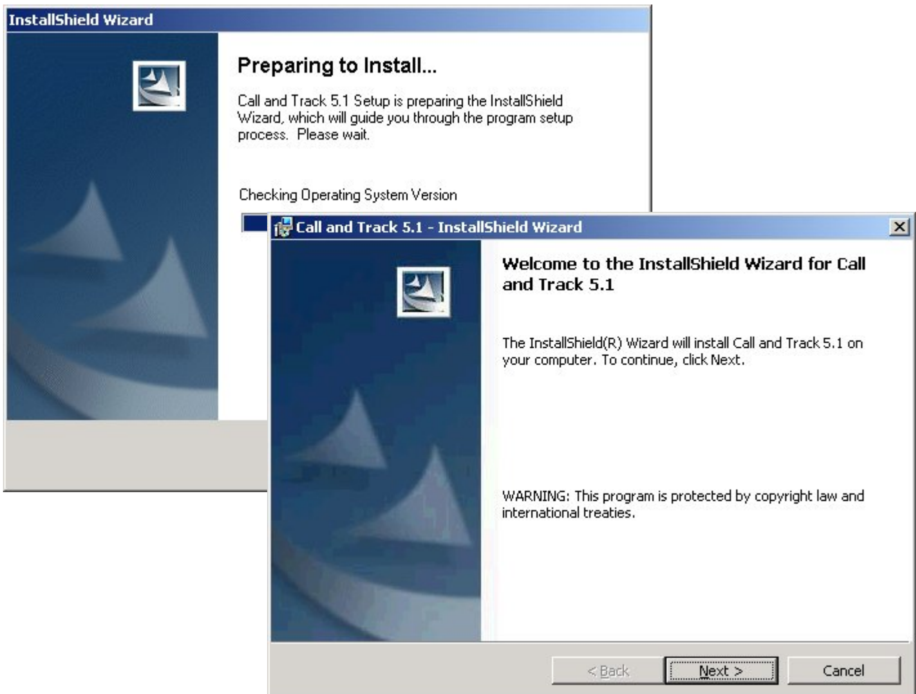
3.4 Complete Client Installation of Call- & Track

After installing Microsoft SQL 2000 Server, we recommend always to choose the option *Complete Installation of Call- & Track*, because this option includes all necessary installation steps as there are ...

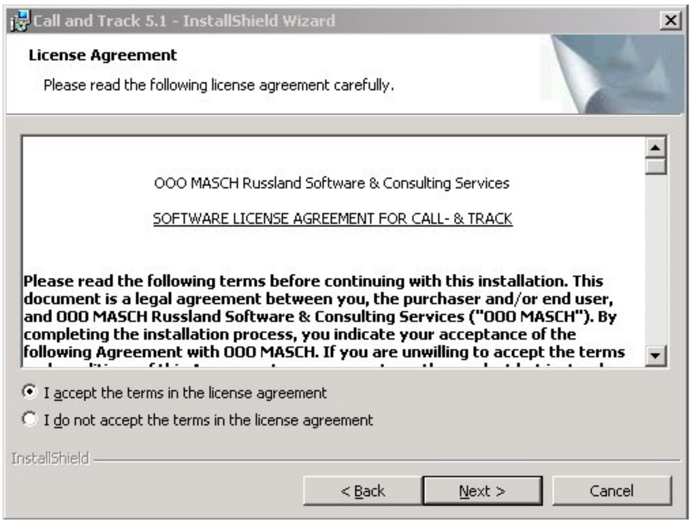
- Installation of program files
- Installation of the database + database engine
- Proper configuration of the ODBC interface
- Setup of the Call- & Track archive printer

3.4.1 Start of the Call- & Track installation and license agreement

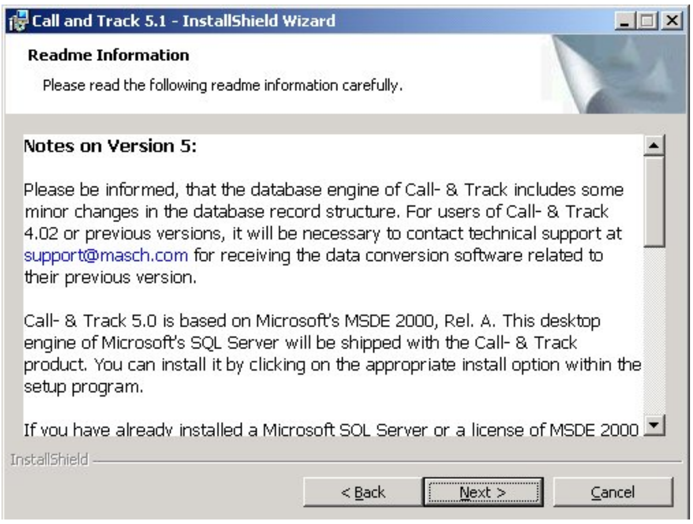
We will explain you now each step of the complete installation procedure. Please select now the option *Complete Installation of Call- & Track* and launch the setup procedure. Please confirm the start of the installation by clicking on *Next* as shown in the second screen.



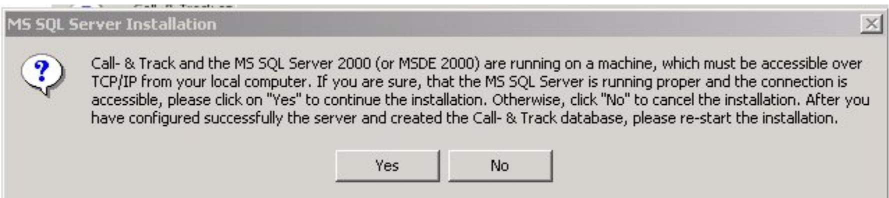
You should read the now shown *License Agreement (enclosure1)* carefully. You can only go forward with your Call- & Track software installation, if you agree to the License agreement of the software:



Please also read the *Readme Information* (*enclosure 2*) carefully. It includes the latest tips according to version and service state as well as explanations regarding system requirements.



After reading and accepting the *Readme Information*, you will be once more reminded regarding the necessary Microsoft SQL Server installation and the installation of the Call- & Track master database:

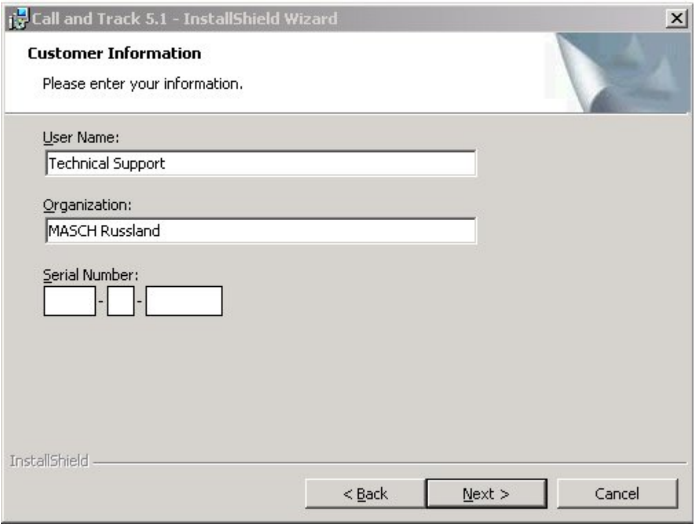


The screen above might be different depending on the Call- & Track release, which you are planning to install and might show slight modifications especially in the versions 5.1 and 5.2 of Call- & Track.

- If you have already installed your Microsoft Database Server, please click *Yes* and continue with the Call- & Track installation.
- If you must answer this question with *No,* the Call- & Track installation will be cancelled and you have to carry out the installation of your Microsoft SQL2000 Server before.

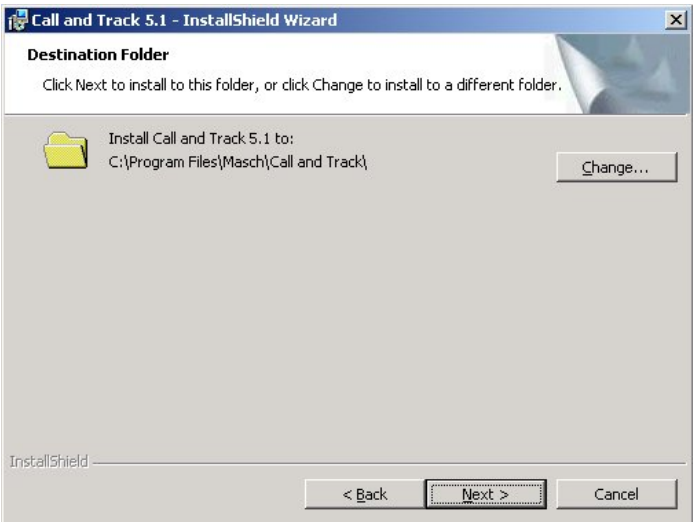
3.4.2 Technician and Serial No. Registration

You will find the Serial No. of your Call- & Track Software on the sleeve of your CD. Please keep the number in a save place since the License seats of your Call- & Track installation especially in a multi user environment are based and detected by the proper entry of the Call- & Track serial numbers.

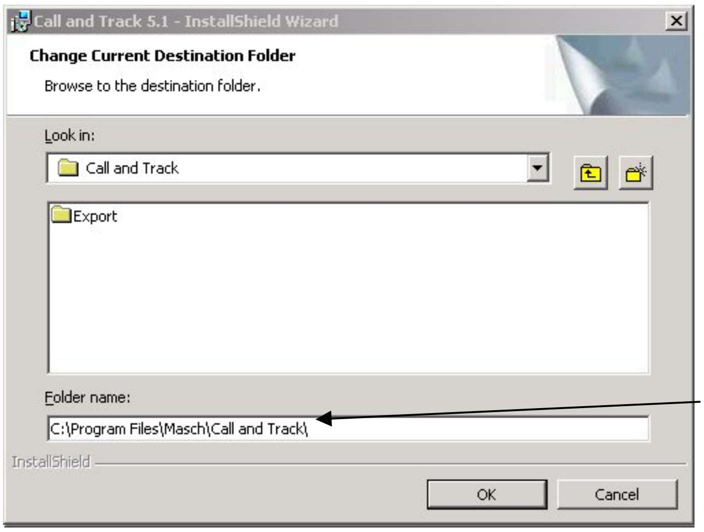


Please enter the Serial No. now and continue with the installation of Call- & Track.

The SETUP Program suggests you now the default directory for Call- & Track 5.1:



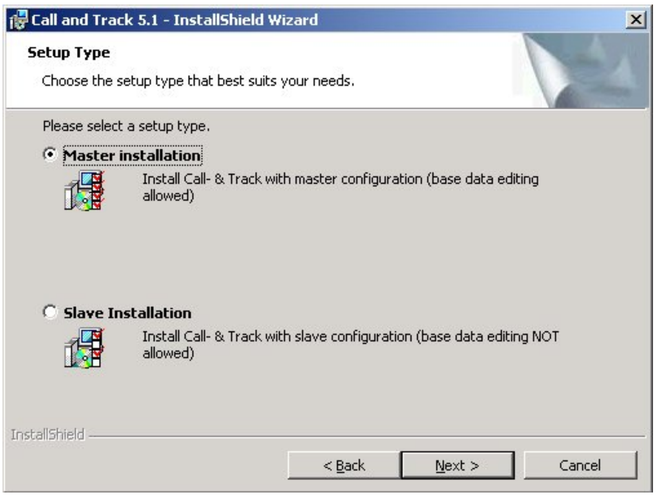
Of course, you can change the default directory values, by clicking onto the *Change* button and then carry out the changes as displayed within the following screen:



Enter the installation and program directory as for your own choice

3.4.3 Setup Type

After indicating the program directory you get the choice between *Master Installation* or *Slave Installation*.

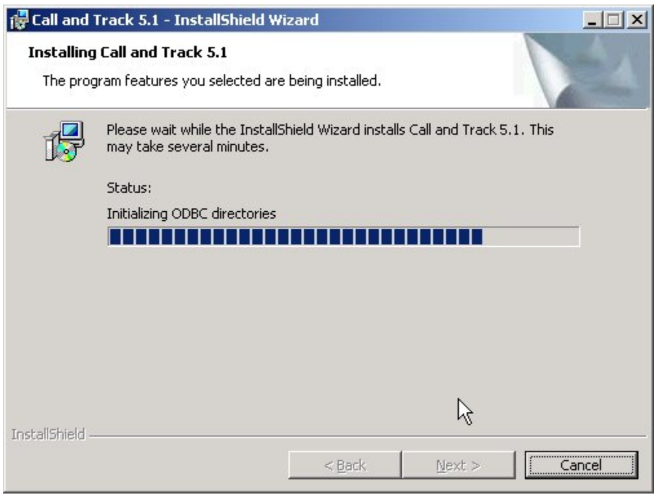


Differences between the setup types:

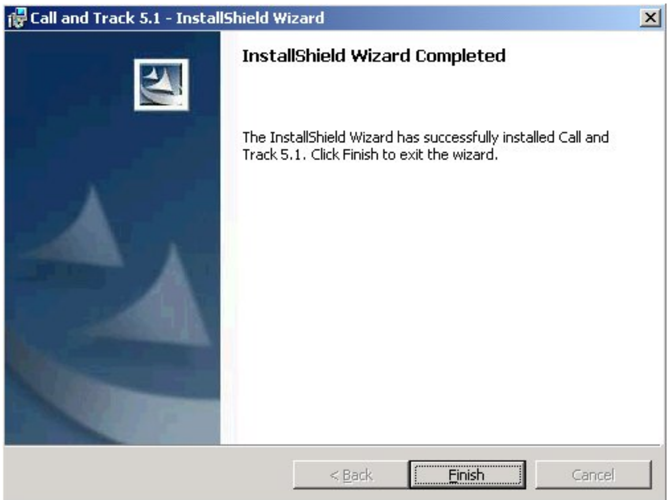
- The *Master Installation* is planned for all workstations within the local network with direct online access to the SQL Server and the Call- & Track master database throughout TCP/IP.
- The *Slave Installation* is planned for external/remote employed technicians with Laptop/Notebook or Standalone PC.

3.4.4 Master Installation

The installation of the program and the system data as well as the automatic setup of the ODBC-interface will be carried out on choosing *Complete Client-Installation.*



Clicking on the button *Finish* will finish the installation.

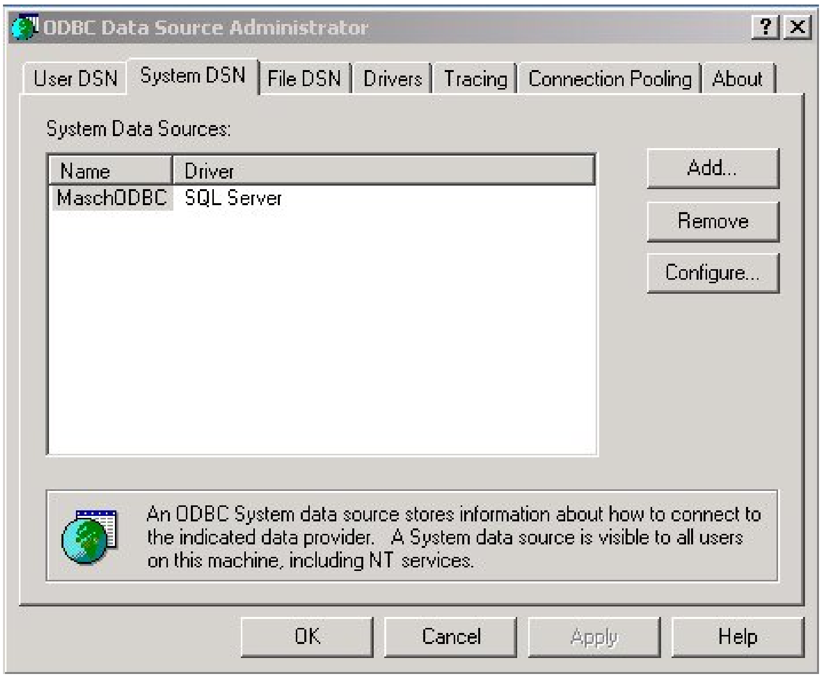


3.4.5 Installation of the ODBC Data Source

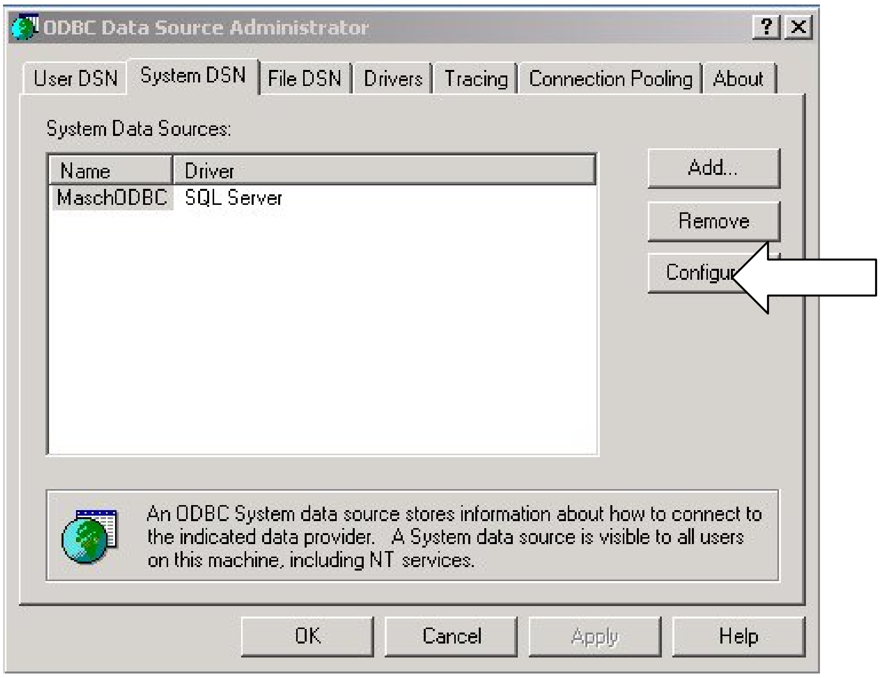
The installation procedure announces the completion of the ODBC Data Source *MaschODBC* and prompts you to proceed with the configuration.

3.4.6 The ODBC Data Source administrator

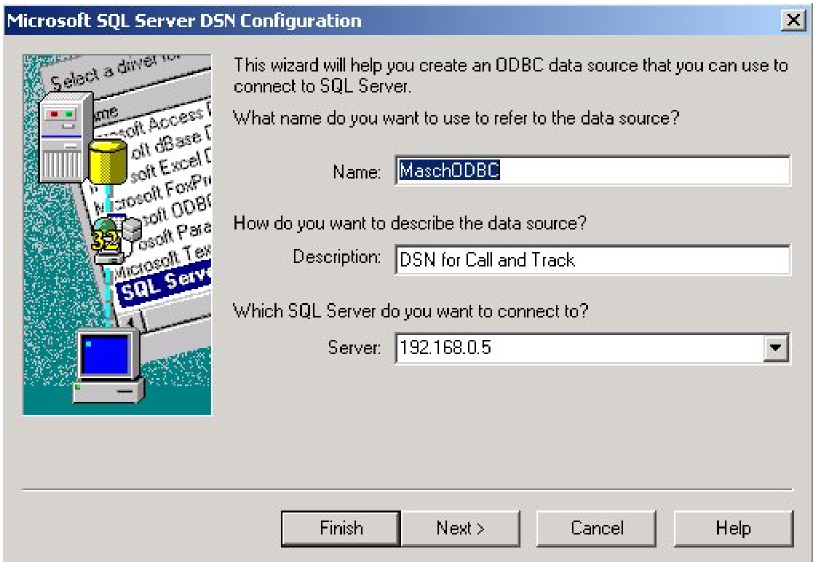
In order to configure the ODBC Data Source please choose the tab *System DSN* and here the system data source *MaschODBC/SQL Server*.



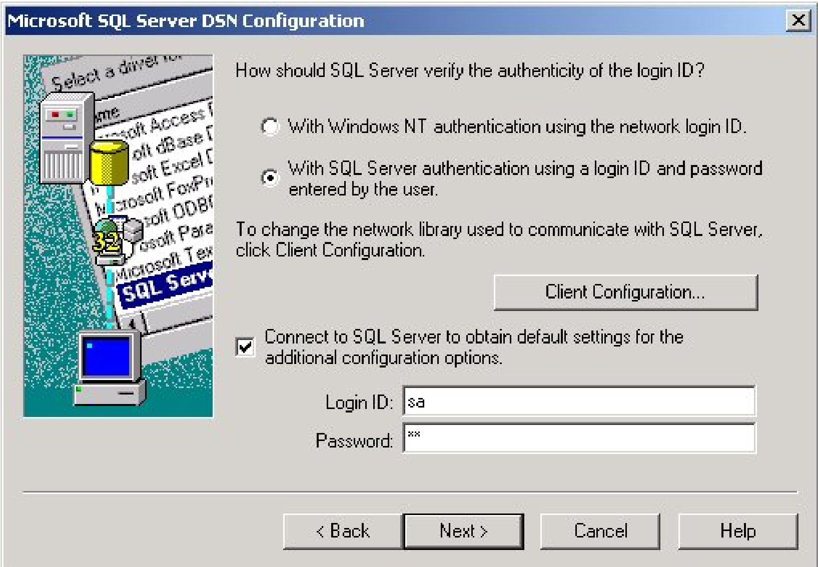
After choosing *Configuration* the setup assistant for the ODBC Data Source setup comes up.



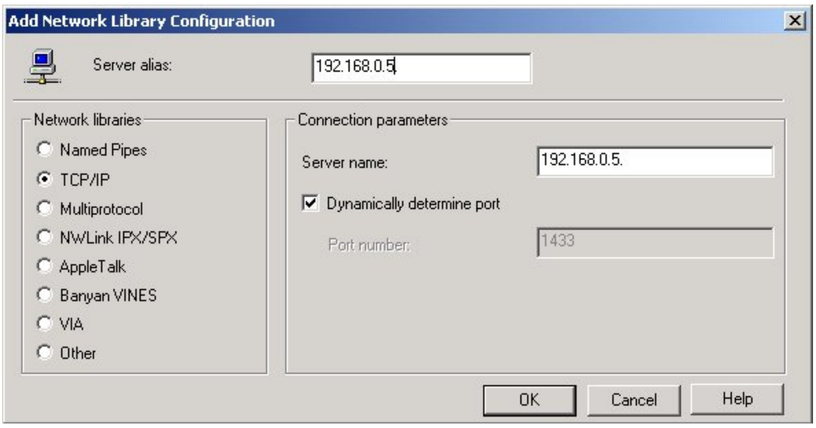
Please enter a name for the description of the data source and the TCP/IP address of the server.



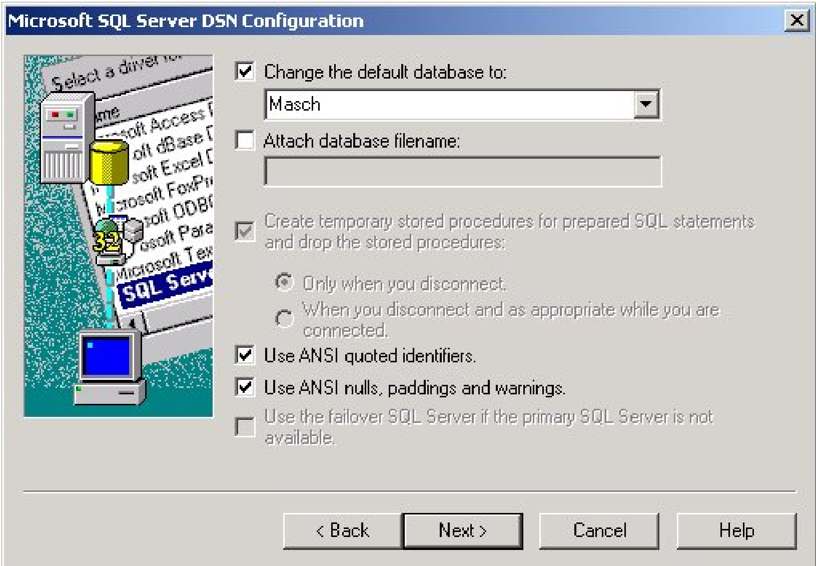
Please choose *With SQL Server Authentication using…* and enter the administrator name and password in order to connect to the SQL Server and carry out necessary settings.



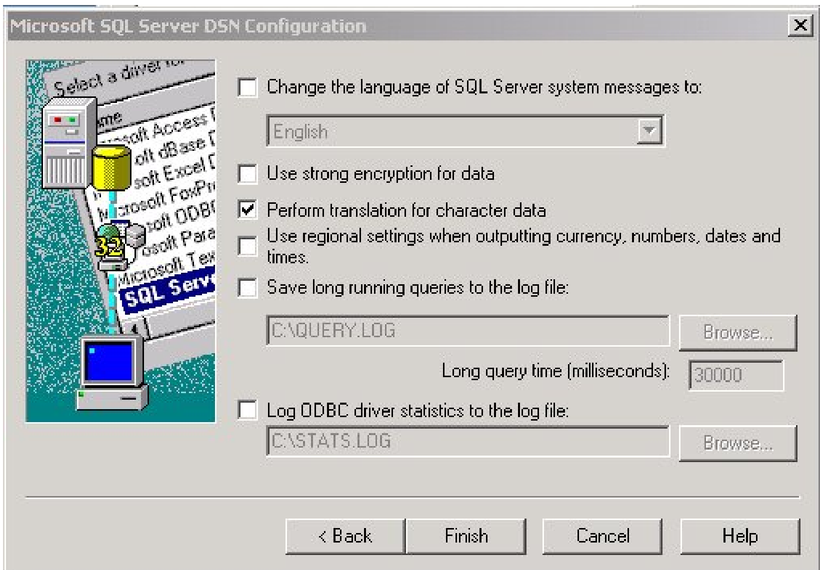
Further settings are possible throughout the button *Client Configuration*.



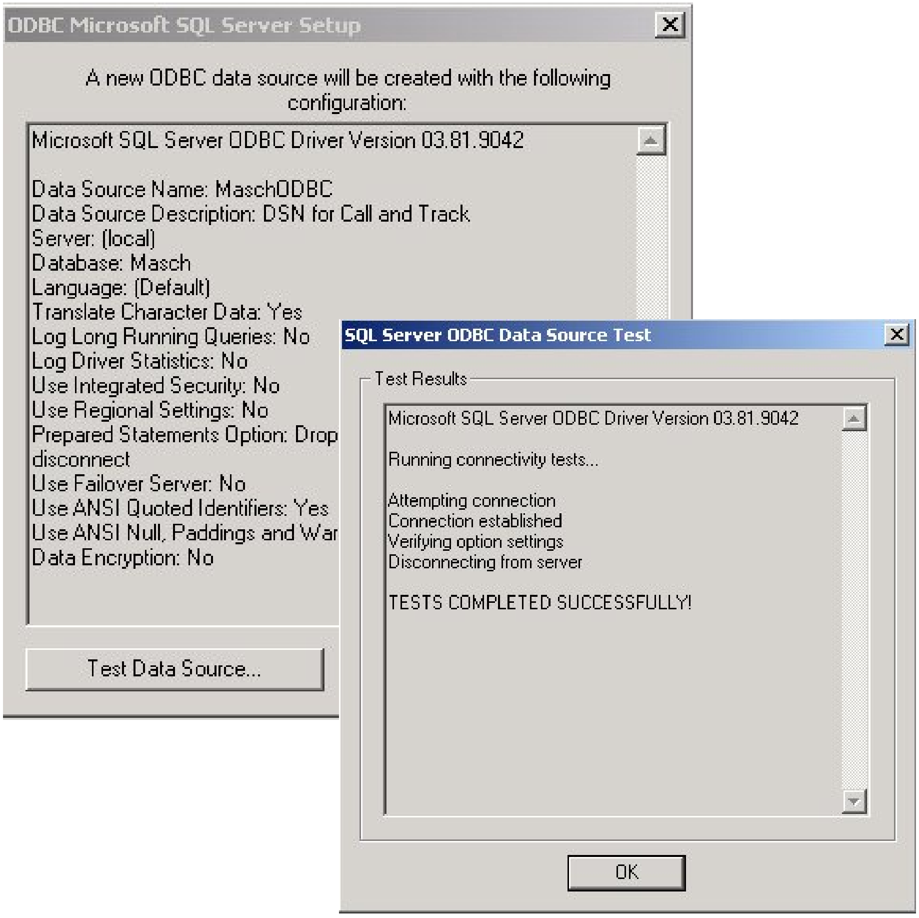
Here the default database is to be set. All other settings can be taken over.



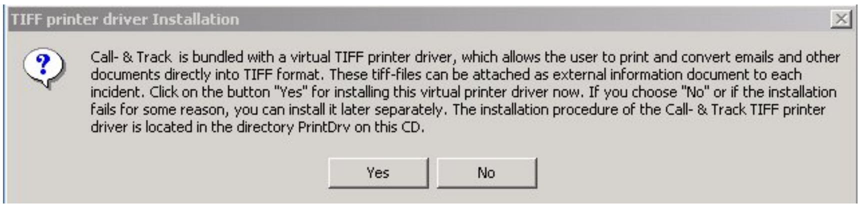
Furthermore there are additional setting options as shown below.



The completion of the ODBC Data Source will be finished with a test and a final announcement.

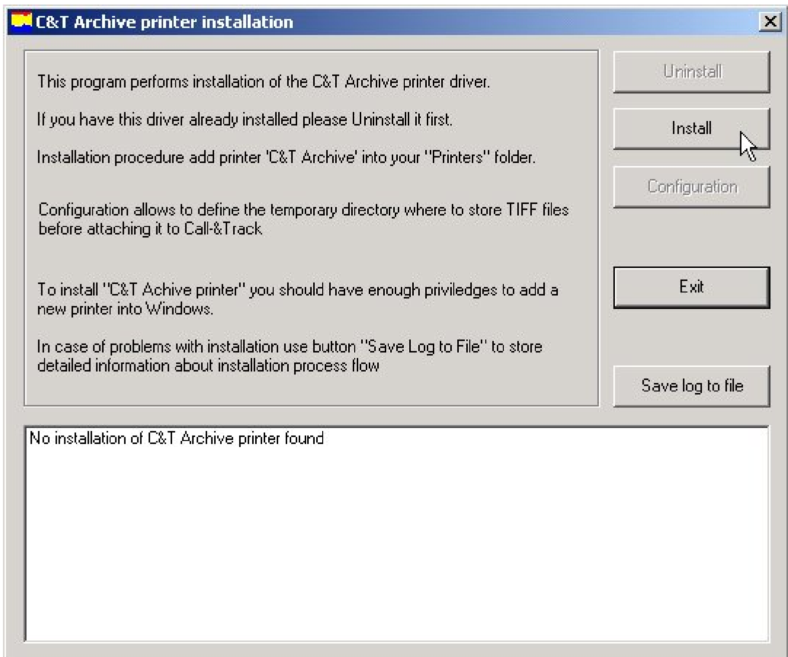


3.4.7 Installation of the Call- & Track Virtual Archive Printer

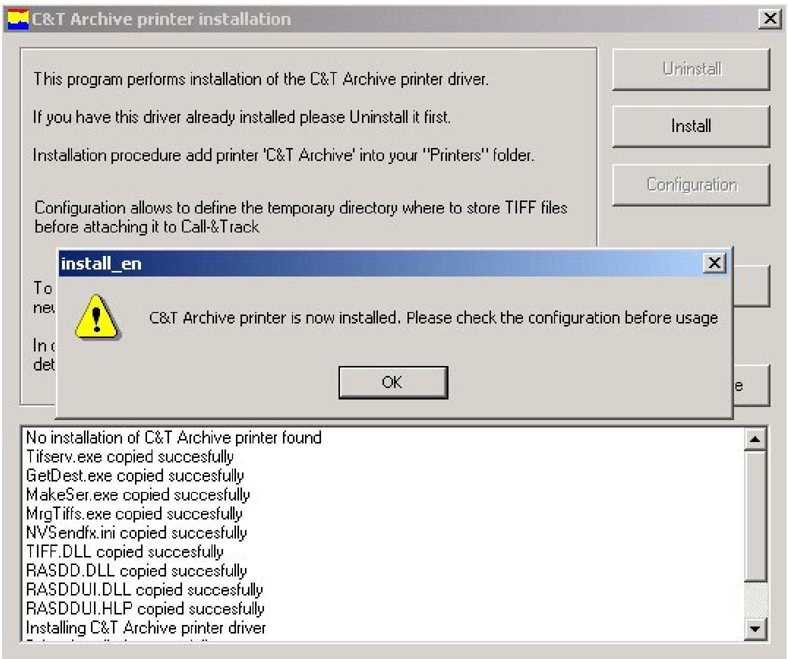


Using the Call- & Tack Virtual Archive Printer you are able to convert external documentation as there are emails, screen shots and other error documentation into universal TIFF files. You can attach these files to the service request by simply processing the steps *Print* and *Paste.* You can attach every file to the service request directly in its original format. Especially emails and email attachments are usually not stored on your local hard drive and have to be laboriously saved, whereas with the virtual *Call- & Track Archive Printer* you can create the necessary attachment file directly and uncomplicated.

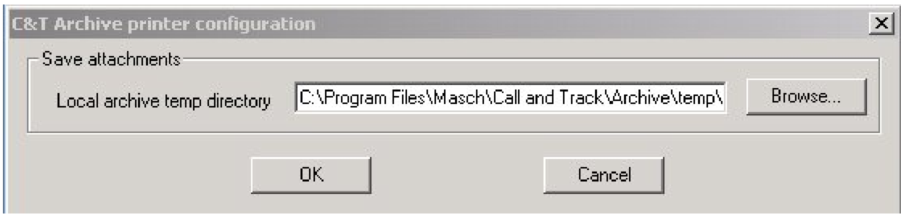
If you answer the above shown question with *Yes* you reach the actual installation screen, which sets up the virtual printer drivers on your workstation.



Please click on the button *Install* and the installation of the *Call- & Track Archive Printer* just takes a couple of seconds. The entire installation process is automatic and at the end of the installation you will see the two following screens:



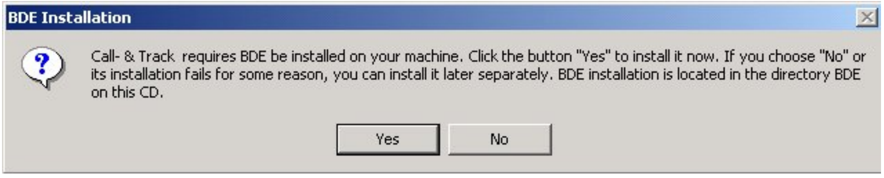
The temporary archive directory can be changed throughout the button *Configuration:*



Please leave the setup of the Call- & Track Archive Printer throughout the button *Finish* and start the last Step of Call- & Track 5.1 installation, the setup of the *Database Engine*.

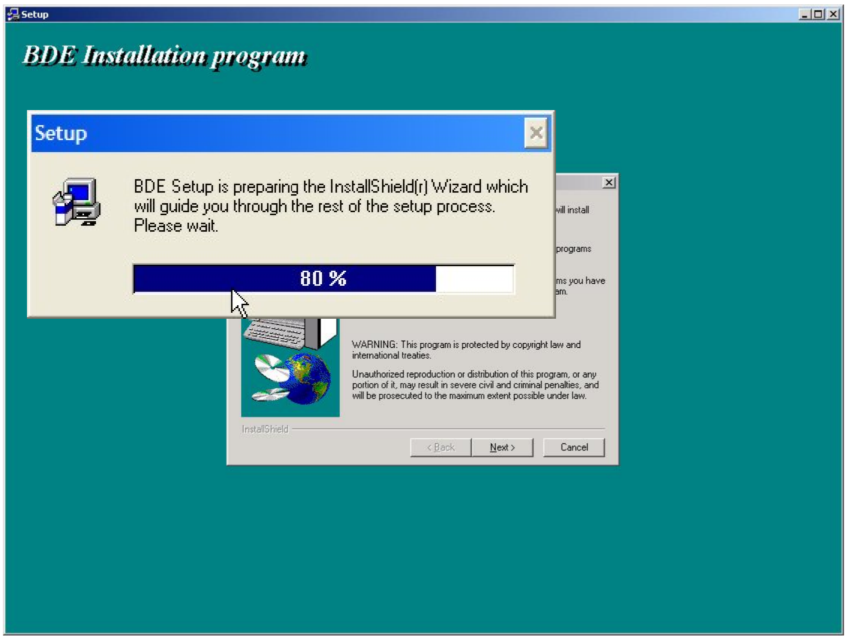
3.4.8 Installation of the BDE Database Engine

As you know already from the previous installation steps, the Call- & Track SETUP program will ask you, if you want to install the BDE:



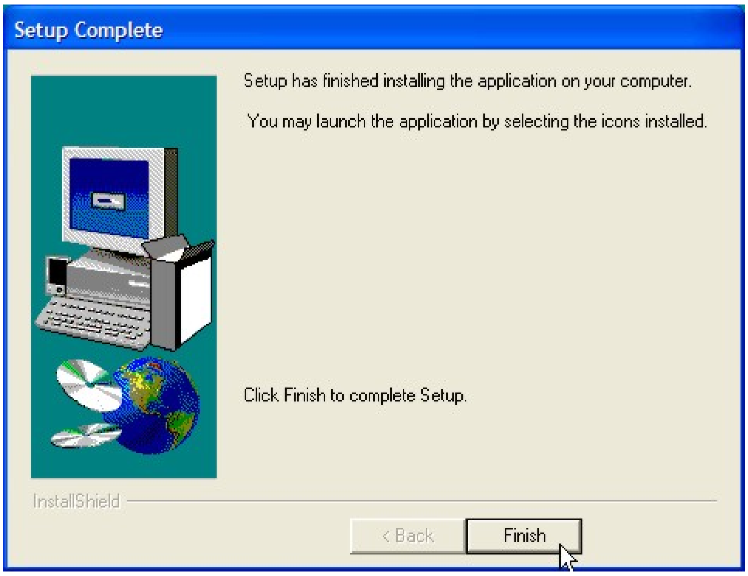
Important Note! Please take care, the installation of the database engine is mandatory, otherwise you will not have a link between the Call- & Track desktop application and your Microsoft SQL 2000 Server based database.

The installation of the database engine is mostly automatic. It will be displayed only in English.



Please click on *Next* in the above shown screen and start the automatic installation.

At the end of the Call- & Track installation you will get the following screen:



Please click on *Finish*. The window will close automatically.

On your Windows Desktop you will find the icon Call- & Track depending on the release which you have purchased. You might launch Call- & Track via the icon below or from the program group *MASCH*.

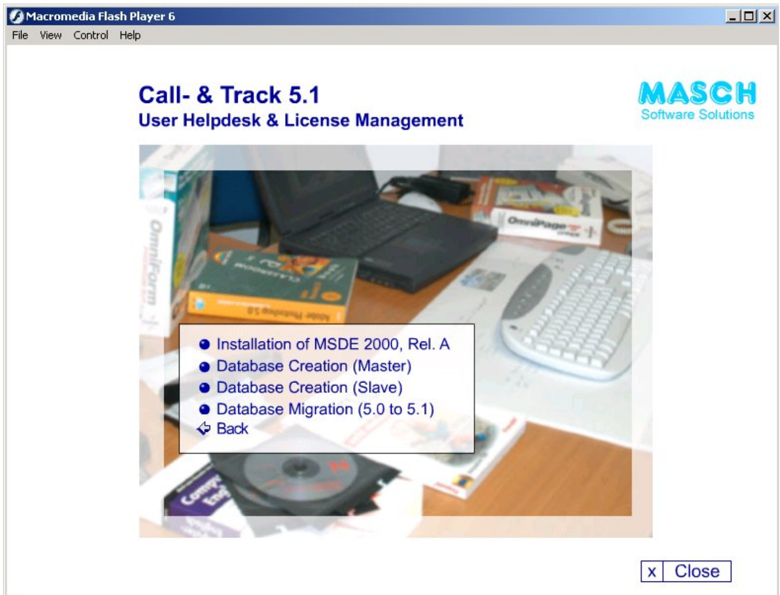
3.5 Installation of a C & T Remote Workstation

3.5.1 Microsoft MSDE 2000 Installation

Under *Server Installation* first choose the installation of the required Microsoft MSDE 2000 (without Enterprise Manager), as far as no Microsoft SQL Server 2000 (with Enterprise Manager) is installed. All steps regarding this installation are explained in chapter **3.3.1 Microsoft MSDE 2000** Installation, please make sure that the MS SQL Server 2000 or the provided MSDE 2000 has been started as explained under **Start of the MS SQL Server**. It might be necessary to restart the computer.

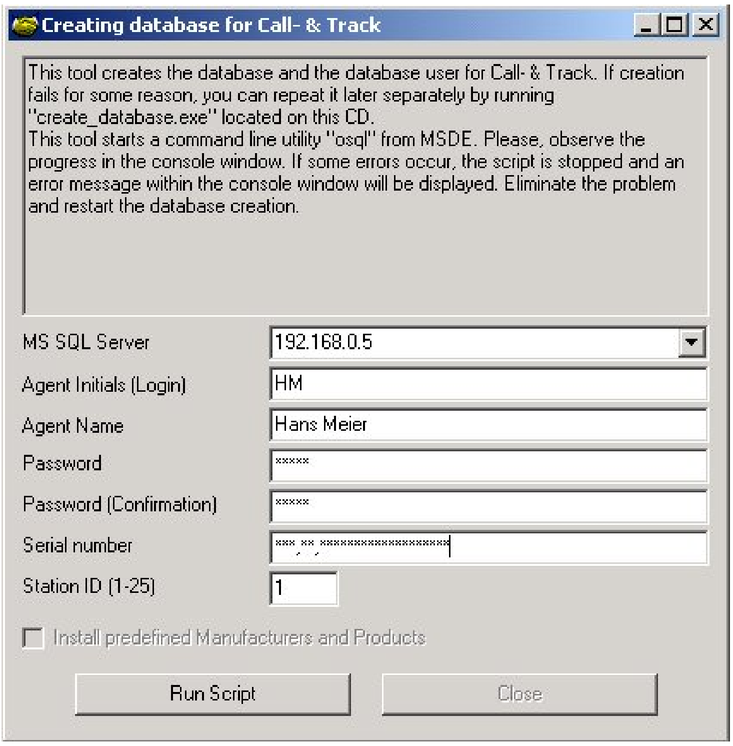
3.5.2 Installation Slave Database

In order to exchange data, it is necessary to install the slave database on the remote workstation.



After the selection of the menu *Database Creation Slave* the following entries are to be made:

- TCP/IP address of the MS SQL Server;
  if you do not know the address, please contact your administrator.
- Agent ID;
  the ID ideally consist of the initial letters of the first and last name. It is of course also possible to create company specific entries.
- Agent Name;
  Entry of the technician's first and last name or company specific names.
- Password and its repetition
- Input of the provided Call- & Track Serial Number
- Station ID;
  it has to be clearly defined and can just be used once.
- The selection of *Installation of predefined manufacturers and products* is not possible.
- Afterwards you need to click on the button *Run Script*.

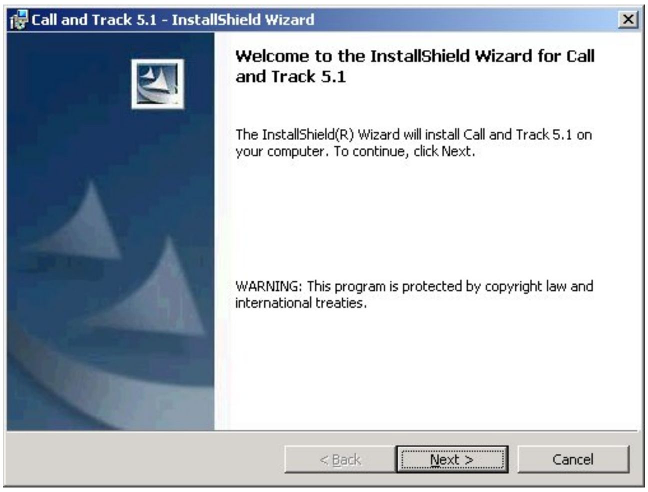


3.5.3 Slave Installation

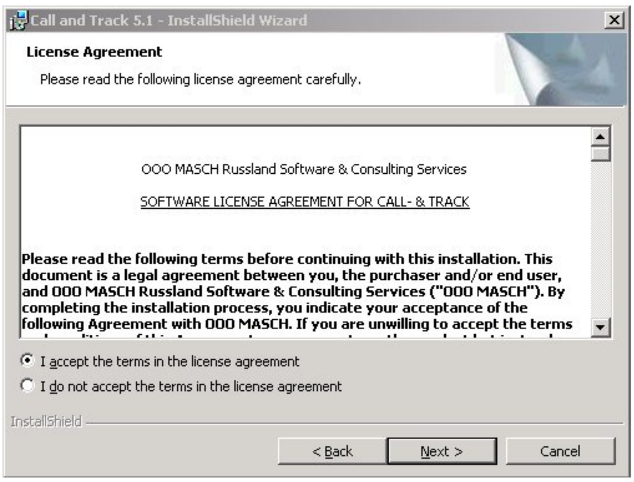
After the installation of Microsoft MSDE 2000 and the slave database, please choose the option *Complete Client-Installation* in order to start the InstallShield Wizard.

3.5.4 Start of the installation and license agreement

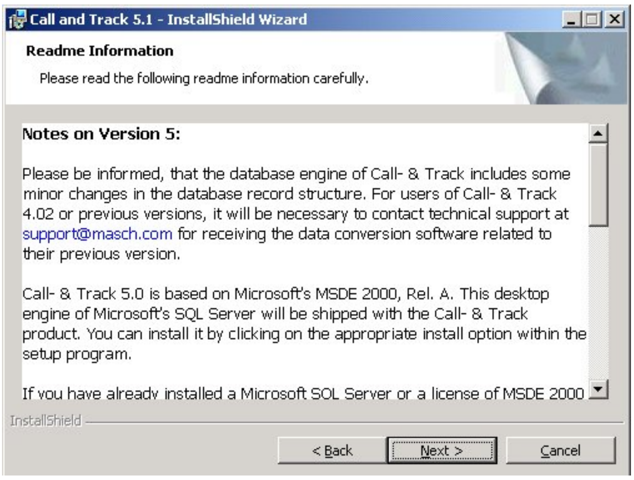
Please confirm the start of the installation by clicking on *Next* as shown in the 2nd screen.



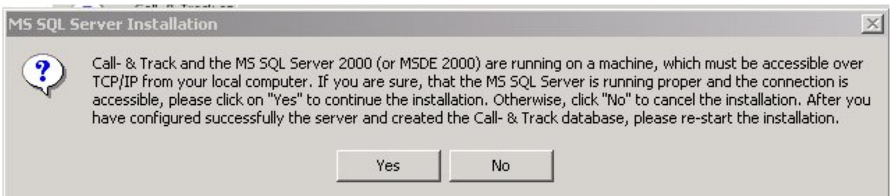
You should read the now shown *License Agreement (enclosure1)* carefully. You can only go forward with your Call- & Track software installation, if you agree to the License agreement of the software:



Please also read the *Readme Information* (*enclosure 2*) carefully. It includes the latest tips according to version and service state as well as explanations regarding system requirements.



After reading and accepting the *Readme Information*, you will once more be reminded regarding the necessary Microsoft SQL Server installation and the installation of the Call- & Track master database:

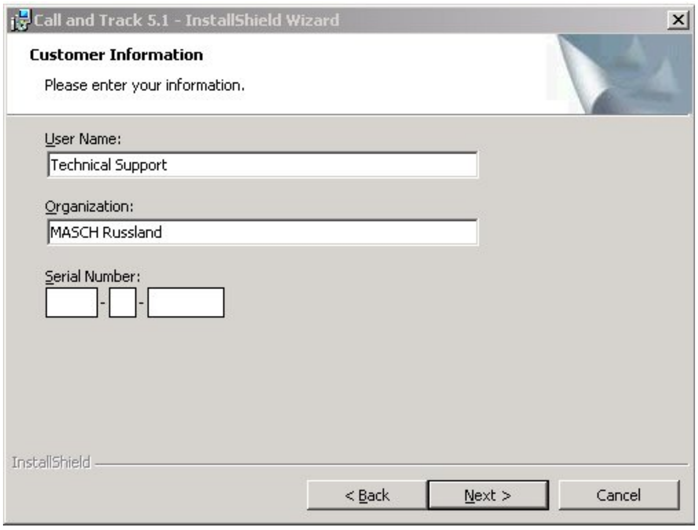


The screen above might be different depending on the Call- & Track release, which you are planning to install and might show slight modifications especially in the versions 5.1 and 5.2 of Call- & Track.

- If you have already installed your Microsoft Database Server, please click *Yes* and continue with the Call- & Track installation.
- If you must answer this question with *No,* the Call- & Track installation will be cancelled and you have to carry out the installation of your Microsoft SQL2000 Server before.

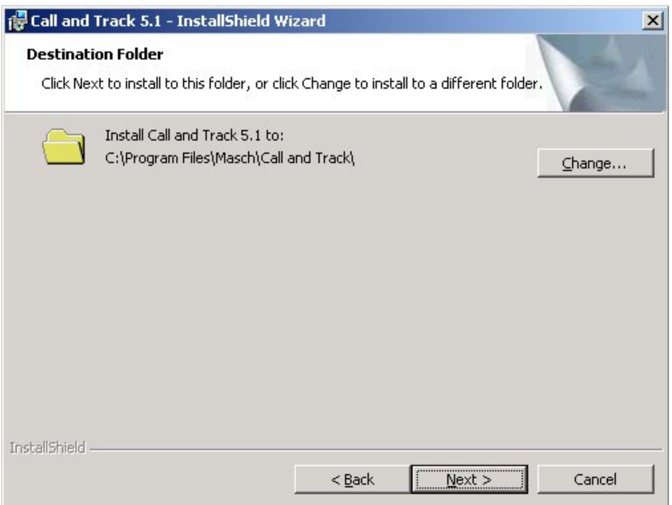
3.5.5 Technician and Serial No. Registration

You will find the Serial No. of your Call- & Track Software on the sleeve of your CD. Please keep the number in a save place since the license seats of your Call- & Track installation especially in a multi user environment are based and detected by the proper entry of the Call- & Track serial numbers.

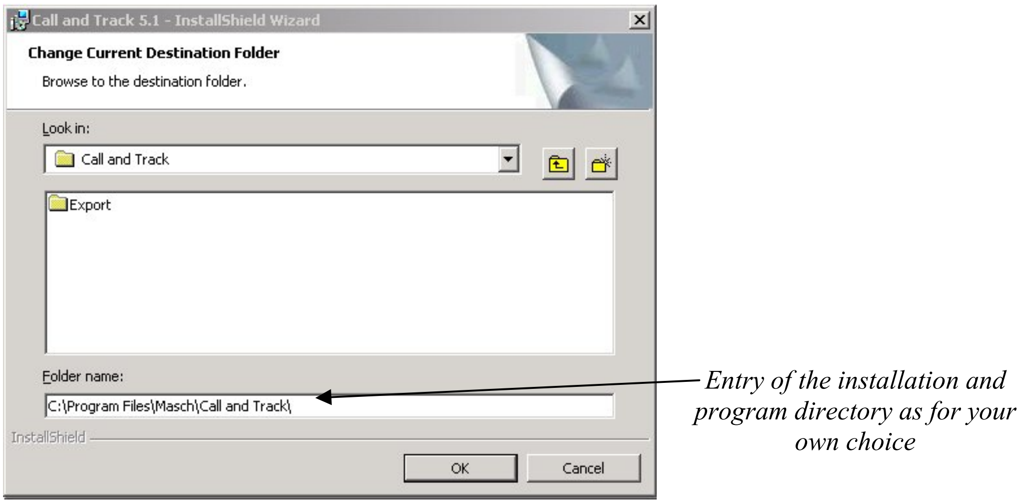


Please enter the Serial No. now and continue with the installation of Call- & Track.

The SETUP Program suggests you now the default directory for Call- & Track 5.1:

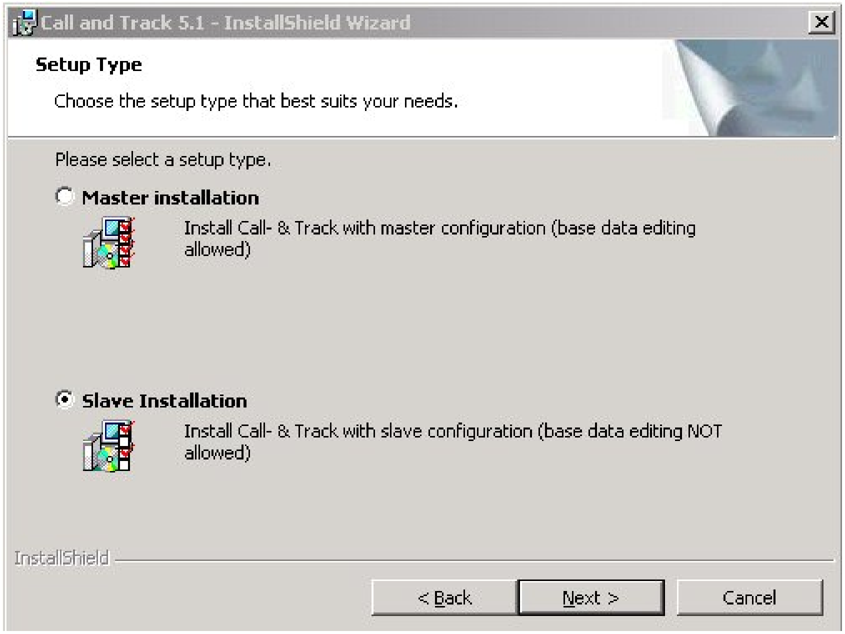


Of course, you can change the default directory values, by clicking onto the *Change* button and then carry out the changes as displayed within the following screen:



3.5.6 Setup Type

After indicating the program directory you get the choice between *Master Installation* or *Slave Installation*



3.5.7 Installation will be interrupted

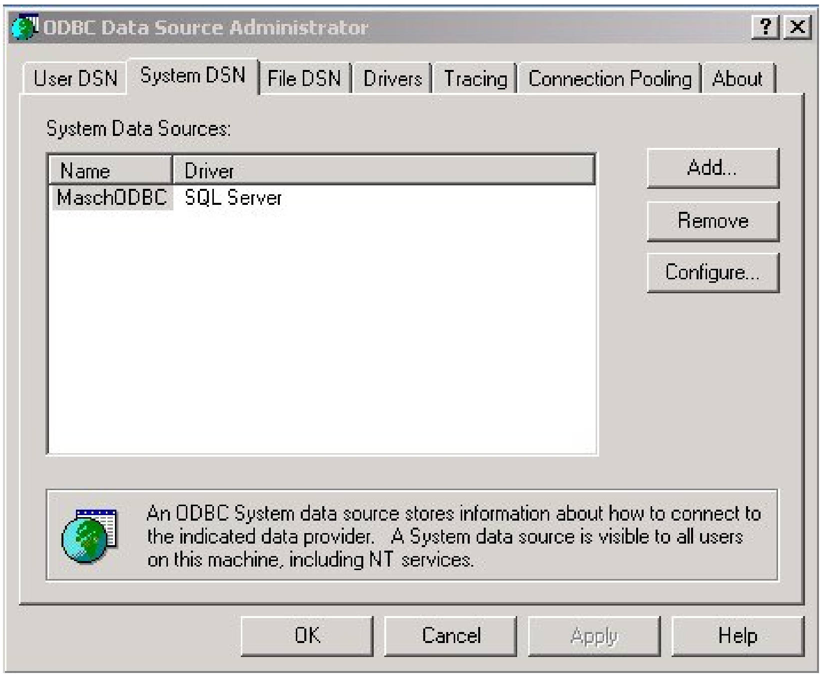
If an antivirus software is running during the installation, it might come to the errors “Dangerous Script” or “High Risk” leading to the object “Windows Script Host Shell Object”, the activity “RegWrite” or the file “MsiExec.exe”. In this case, please deactivate the antivirus software or allow the admission of the script.

3.5.8 ODBC Data Source

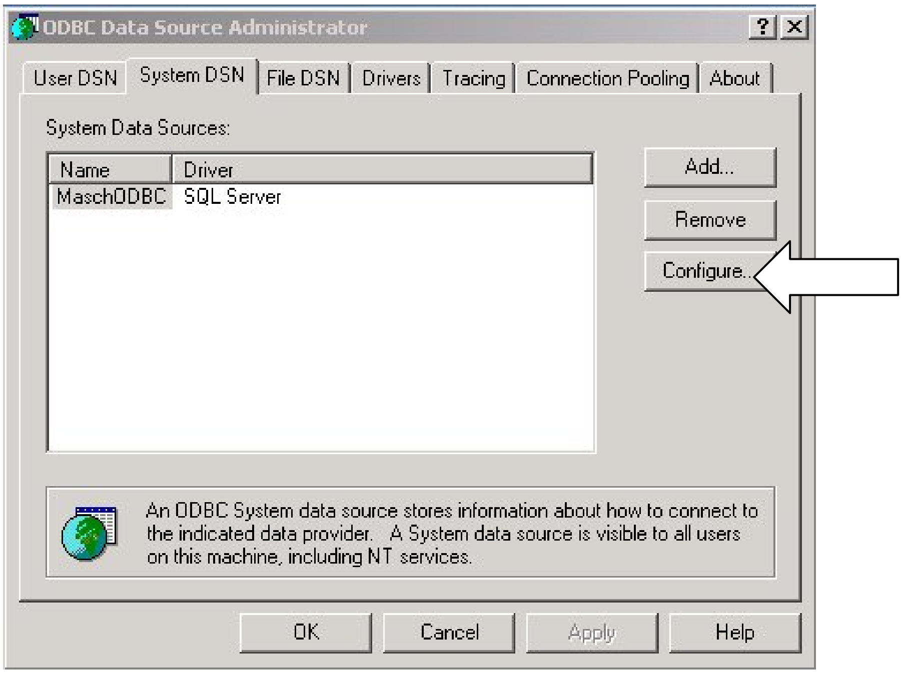
The installation procedure announces the completion of the ODBC Data Source *MaschODBC* and prompts you to proceed with the configuration.

3.5.9 The ODBC Data Source administrator

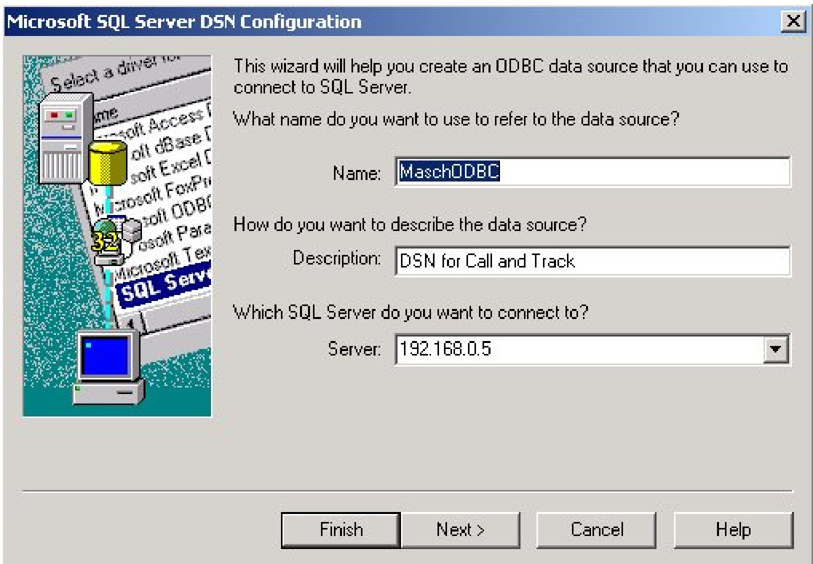
In order to configure the ODBC Data Source please choose the tab *System-DSN* and here the system data source *MaschODBC/SQL Server*



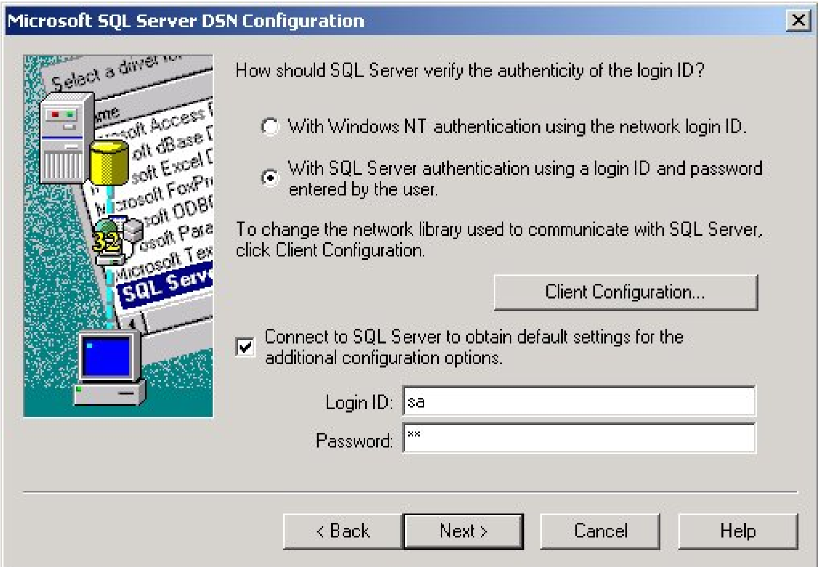
After choosing *Configuration* the setup assistant for the ODBC Data Source Setup comes up.



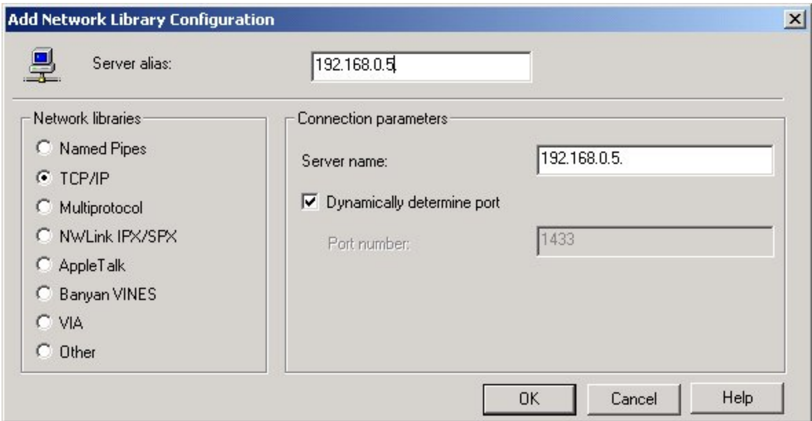
Please enter a name for the description of the data source and the TCP/IP address of the server.



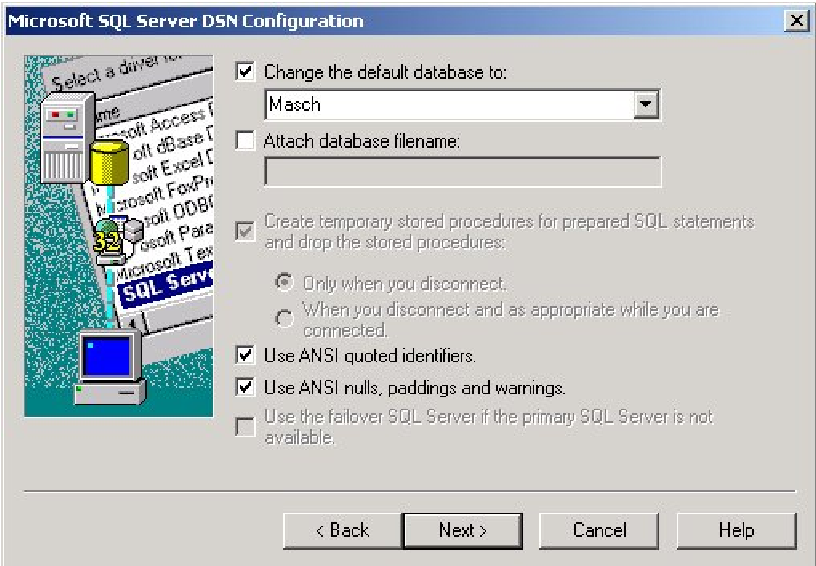
Please choose *With SQL Server Authentication using…* and enter the administrator name and password in order to connect to the SQL Server and carry out necessary settings.



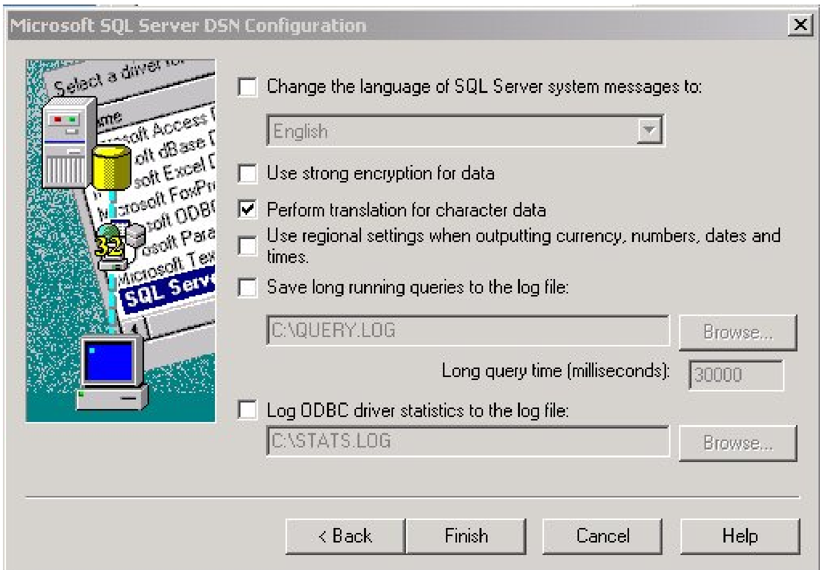
Further settings are possible throughout the button *Client Configuration*.



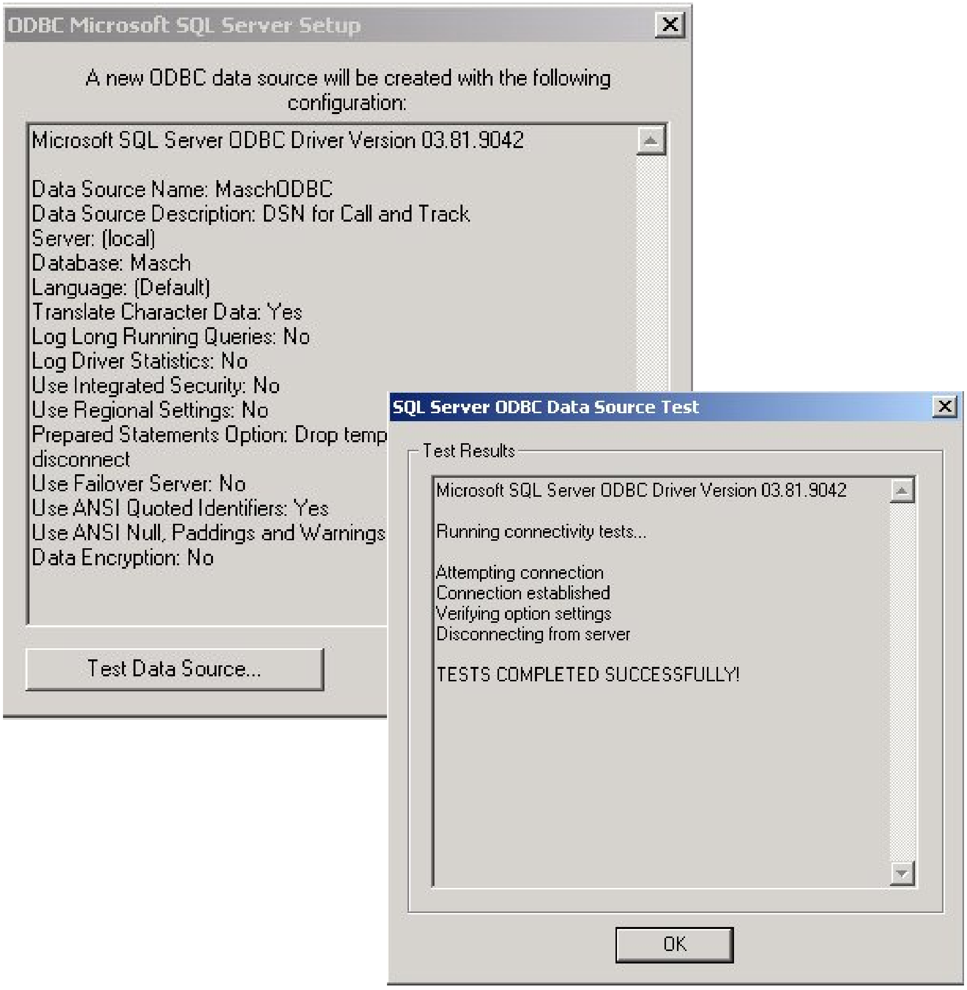
Here the default database is to be set. All other settings can be taken over.



The default settings of the next screen can be taken over as well.



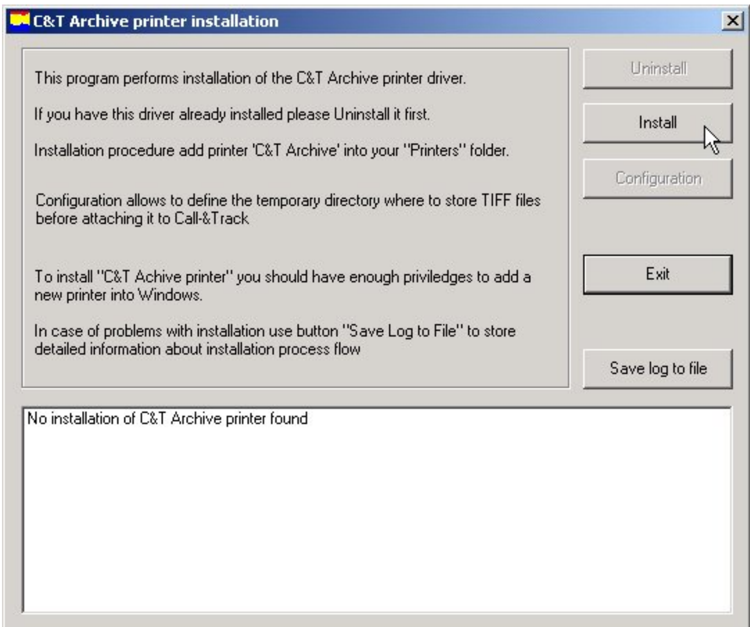
The completion of the ODBC Data Source will be finished with a test and a final announcement.



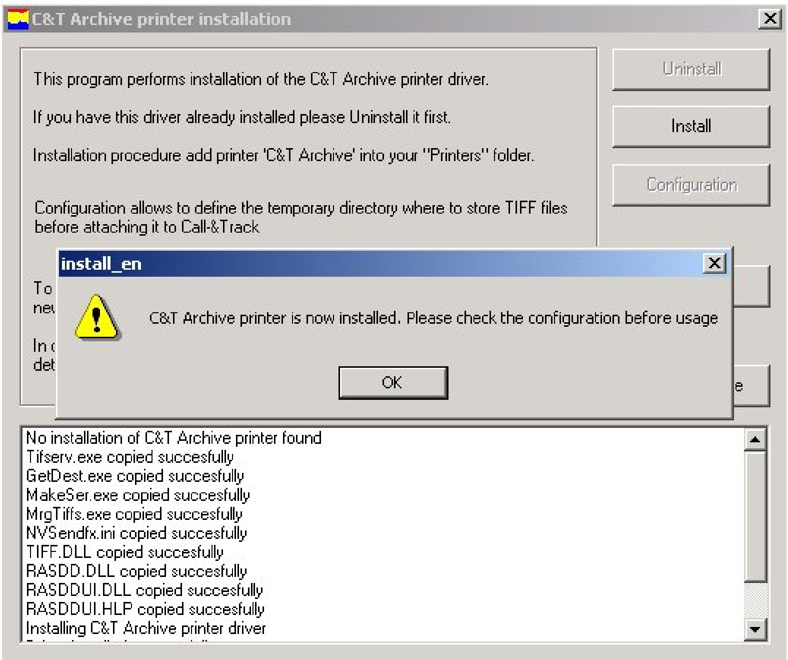
3.5.10 Installation of the Call- & Track Archive Printer

Using the Call- & Tack Virtual Archive Printer you are able to convert external documentation as there are emails, screen shots and other error documentation into universal TIFF files. You can attach these files to the service request by simply processing the steps *Print* and *Paste.* You can attach every file to the service request directly in its original format. Especially emails and email attachments are usually not stored on you local hard drive and have to be uncomfortably saved, whereas with the virtual *Call- & Track Archive Printer* you can create the necessary attachment file directly and uncomplicated.

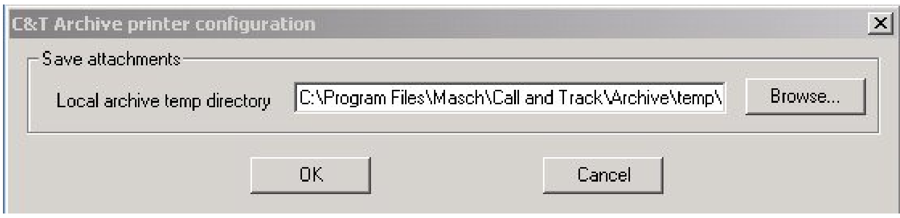
If you answer the above shown question with *Yes* you reach the actual installation screen, which sets up the virtual printer drivers on your workstation.



Please click on the button *Install* and the installation of the *Call- & Track Archive Printer* just takes a couple of seconds. The entire installation process is automatic and at the end the installation you will see the two following screens:



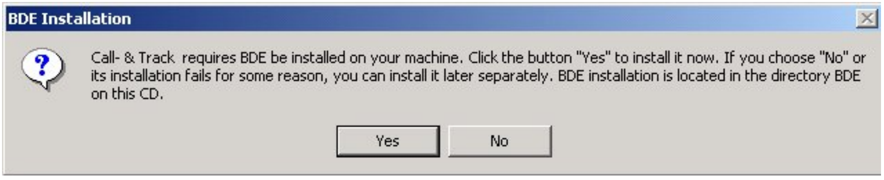
The temporary archive directory can be changed throughout the button *Configuration:*



Please leave the setup of the Call- & Track Archive Printer throughout the button *Finish* and start the last Step of Call- & Track 5.1 installation, the setup of the *Database Engine*.

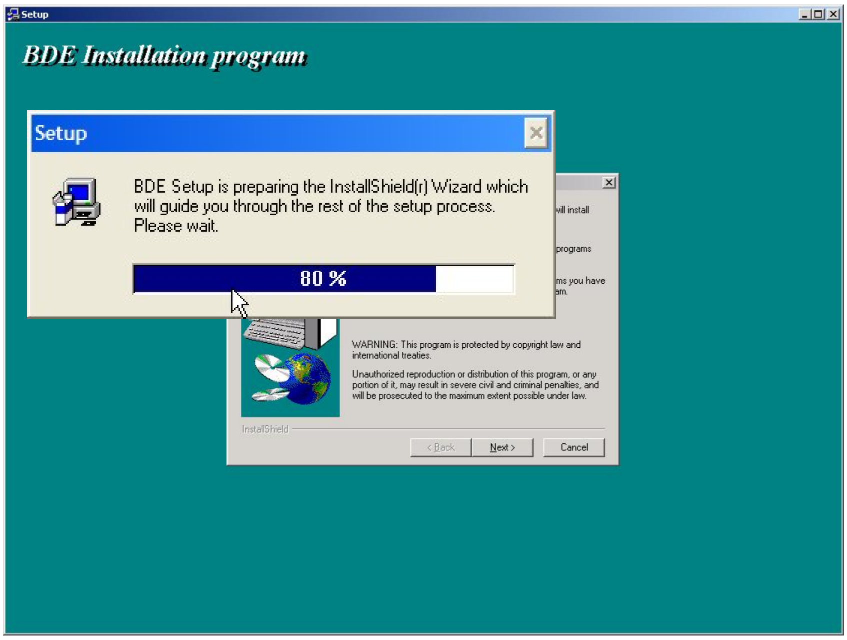
3.5.11 Installation of the BDE Database Engine

As you know already from the previous installation steps, the Call- & Track SETUP program will ask you, if you want to install the BDE:



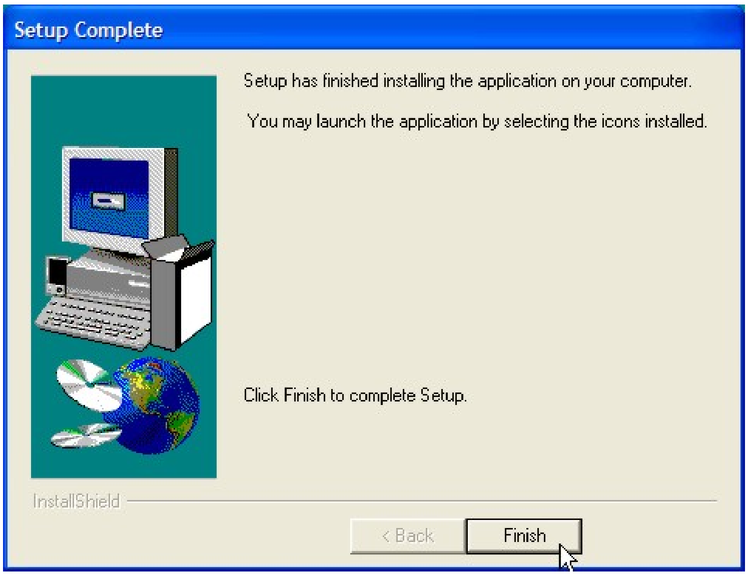
Important Note! Please take care, the installation of the database engine is mandatory, otherwise you will not have a link between the Call- & Track desktop application and your Microsoft SQL 2000 Server based database.

The installation of the database engine is mostly automatic. It will be displayed only in English.



Please click on *Next* in the above shown screen and start the automatic installation.

At the end of the Call- & Track installation you will get the following screen:



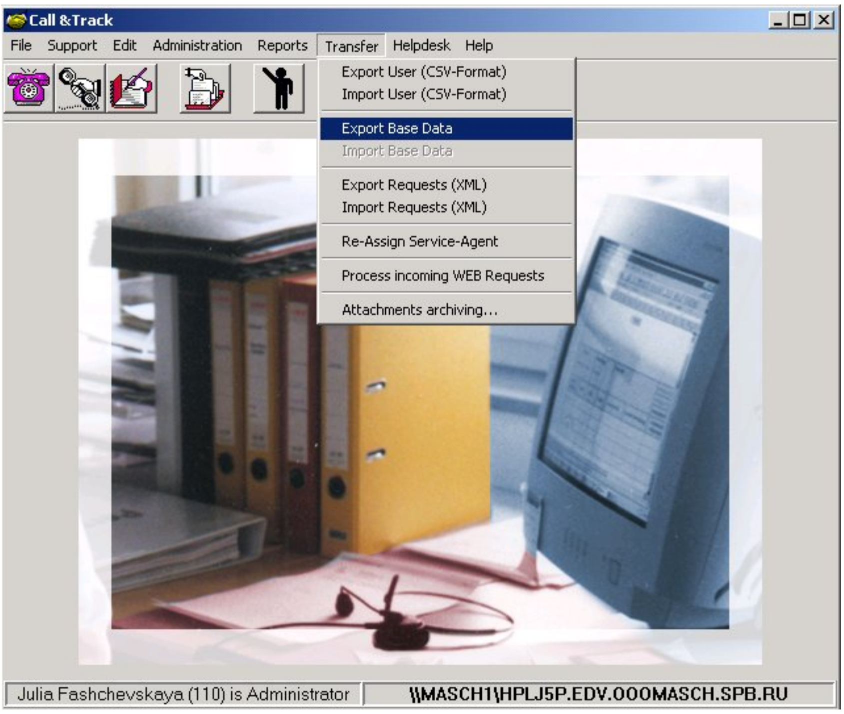
Please click on *Finish*. The window will close automatically.

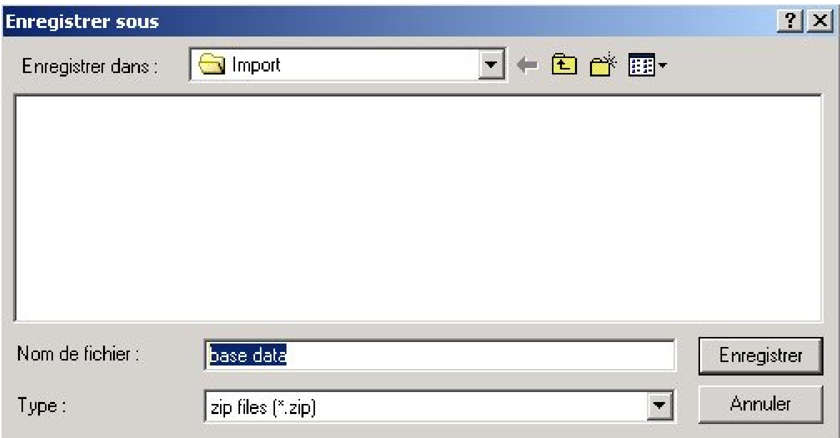
On your Windows Desktop you will find the icon Call- & Track depending on the release which you have purchased. You might launch Call- & Track via the icon below or from the program group *MASCH*.

3.5.12 Import and export base data

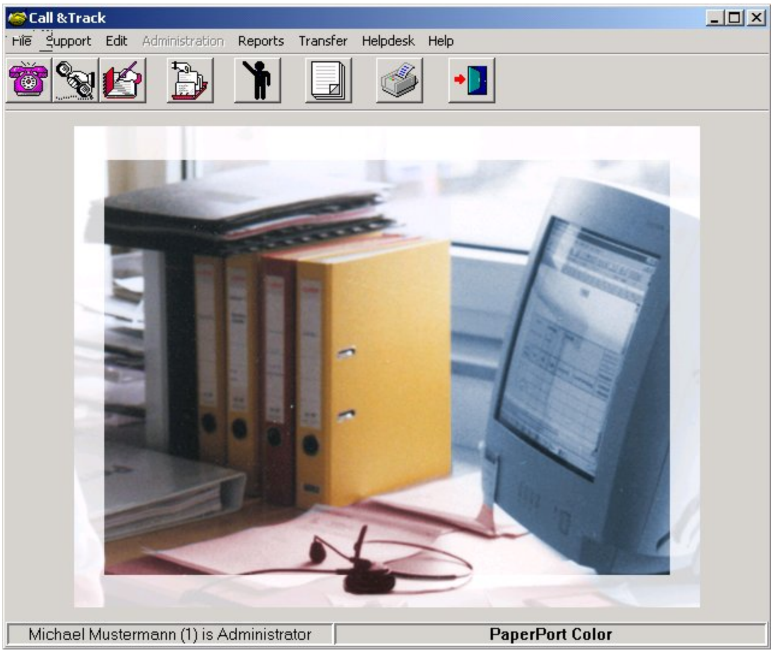
During the installation no database will be created. The record data needed by the remote workstation have to be transferred by the Call- & Track Administrator from the master database to the remote user.

- Therefore the base data will be saved as zip file throughout the menu *Transfer* and *Export Base Data*.

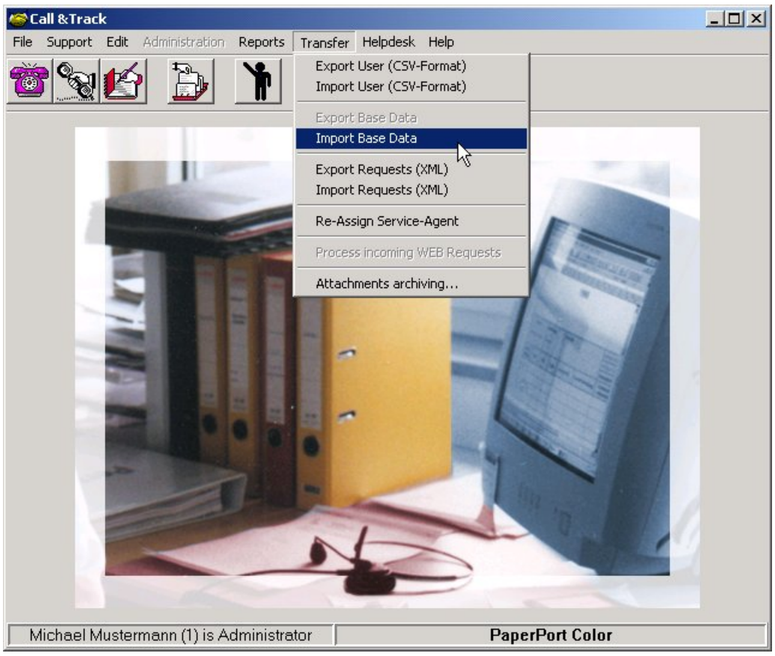




- Creation and change of base data is due to reference and integrity reasons not allowed. Therefore you need to lock the menu *Administration* on the remote workstation.



- The base data from the master database will be imported as zip file throughout the *Transfer/Import Base Data* function and after editing again exported to the database server.



3.6 Setup of the Web Online Form

So that you can use the Web Online Form, the web administrator has to fulfil the following tasks regarding the setup of the web interface.

- Transfer of the files provided in the CD directory *Web support* to the Web Server.

- Individual adaptation of the provided template *form.asp* to the own web layout.

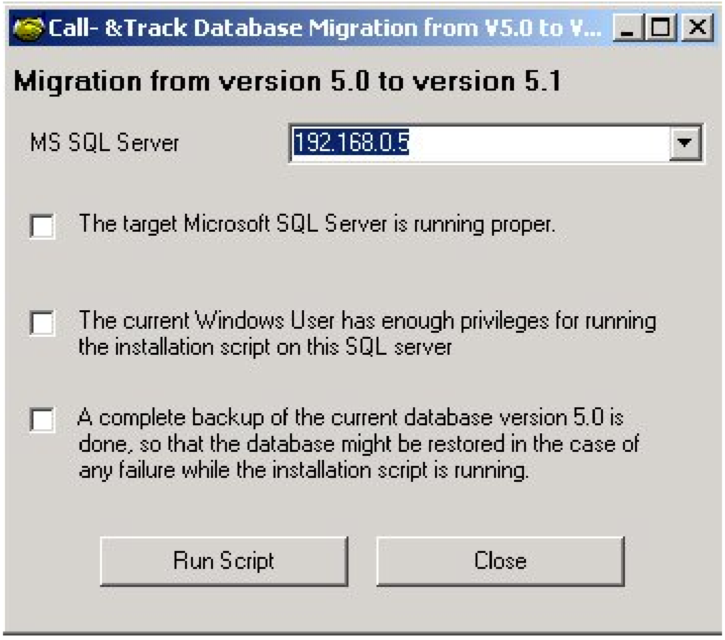
- Guarantee the direct correspondence ability of the form (form.asp) with the SQL Server and the installed Call- & Track 5.1/5.2 database. Therefore you need to add the path and the IP Number of the respective SQL Server in the following shown section of the data source, so that the web server and the SQL server can communicate with each other throughout TCP/IP.

```
Conn.Open "Provider=SQLOLEDB.1;" + _
          "Persist Security Info=False;" + _
          "uid=sa;" + _
          "pwd=sa;" + _
          "Initial Catalog=Masch;" + _
          "Data Source=127.0.0.1"
```

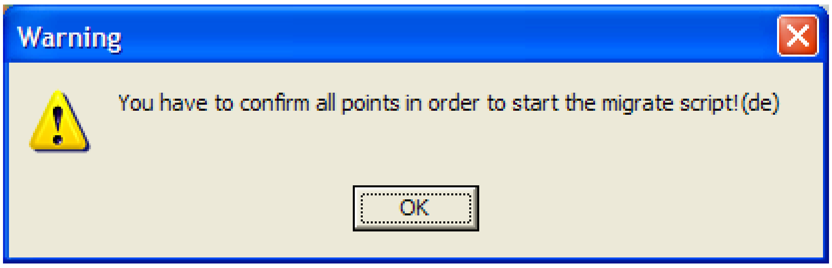
For further information, please see the PDF manual on the CD.

3.7 Database Migration (from 5.0 to 5.1)

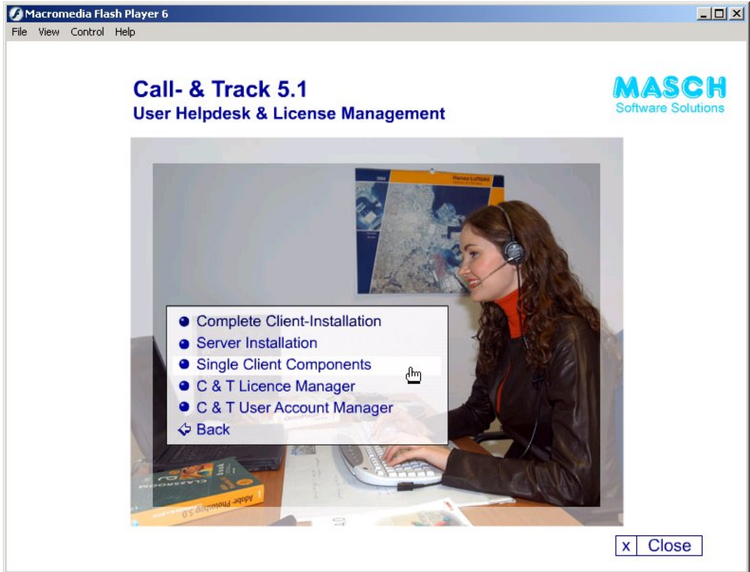
You only need to process this step in order to update Call- & Track from version 5.0 to 5.1/5.2. Therefore please follow these instructions.



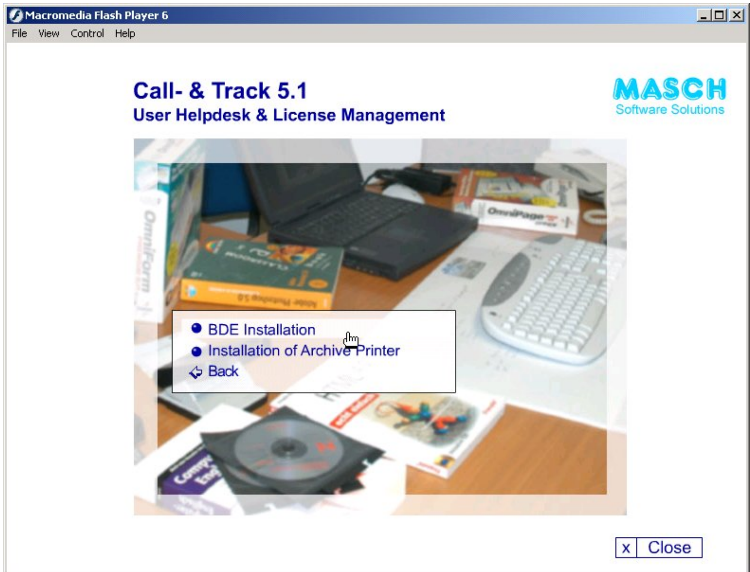
Before running the script you will be once more advised to fulfil the above stated requirements.



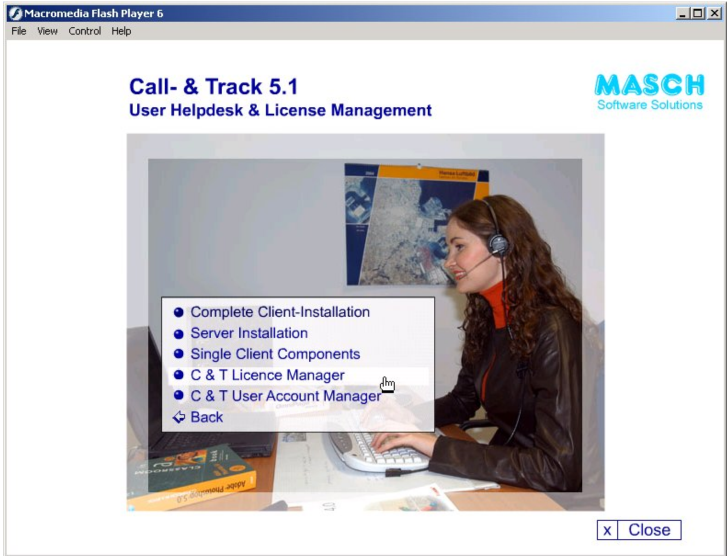
3.8 Add single Client components



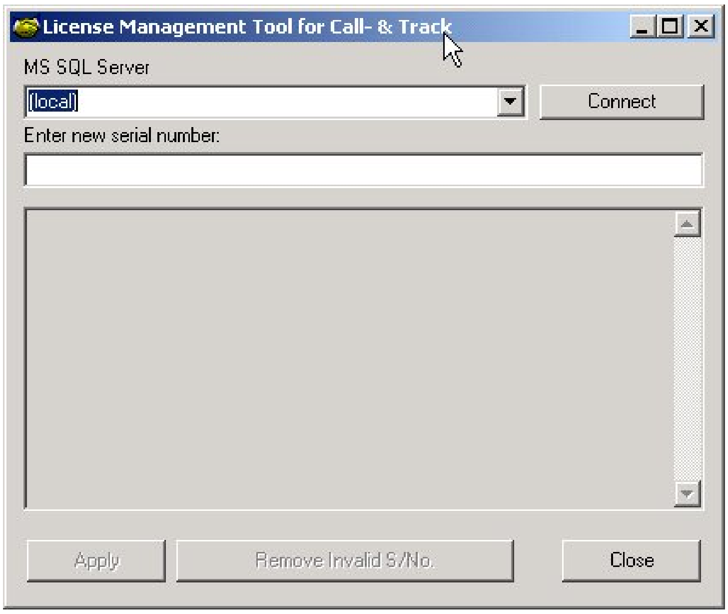
The here given options allow a later installation of the BDE and the Archive Printer. The instructions this regarding have been displayed in the chapters before.



3.9 C & T License Manager

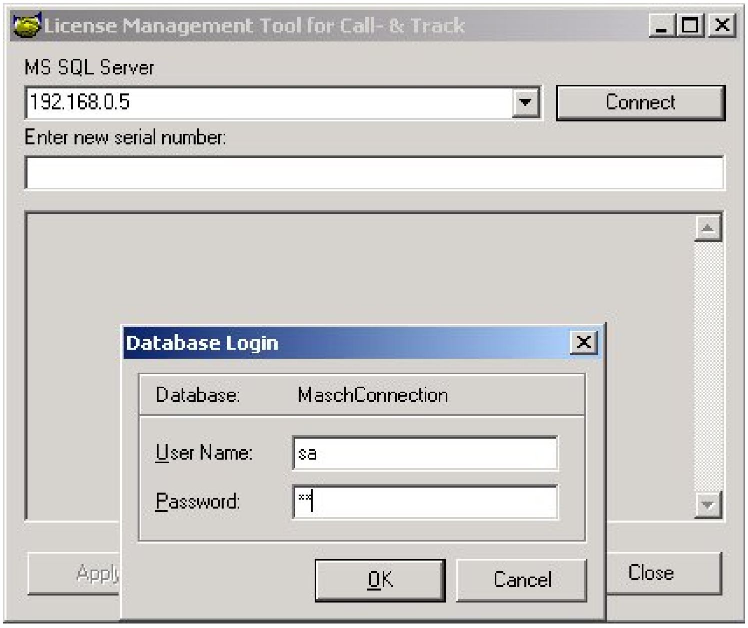


On selecting *C&T License Manager* you receive the following screen:

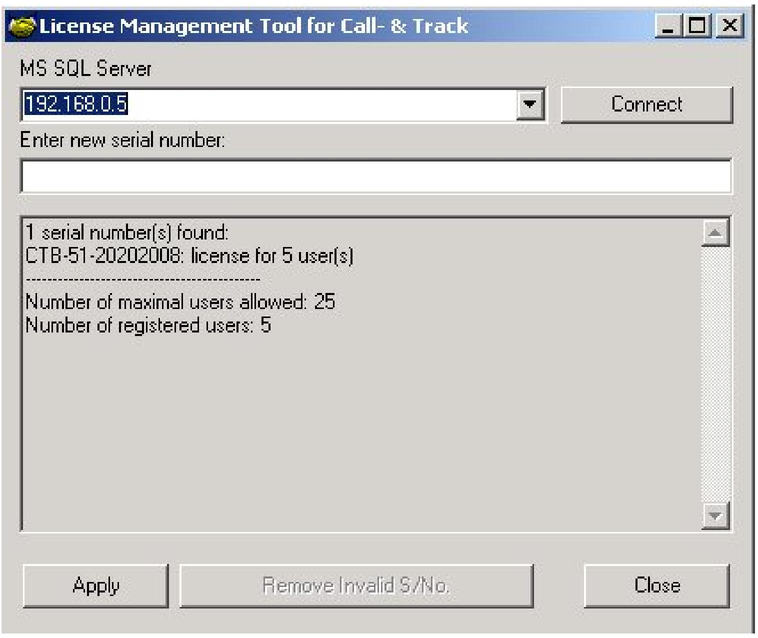


Call- & Track offers you the administration of an unlimited number of PC hardware/software installations. The administration and inventory of all necessary IT agents is carried out through the user account manager.

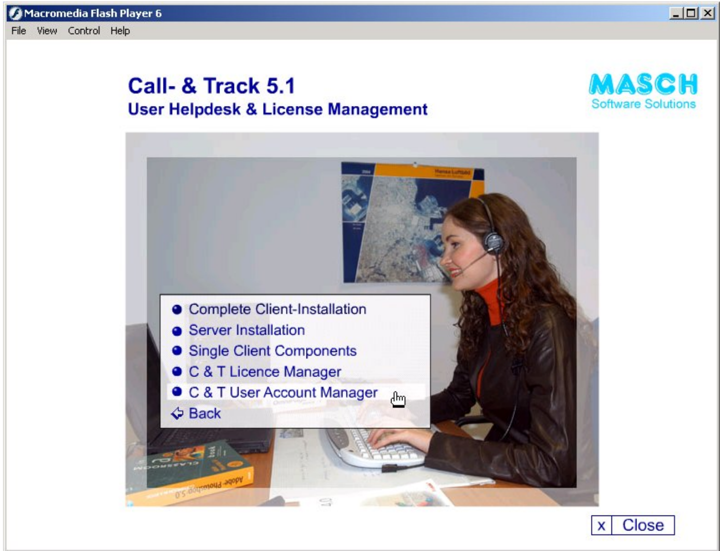
The user administration is processed within Call- & Track throughout the login of the service technician or by Agent ID.



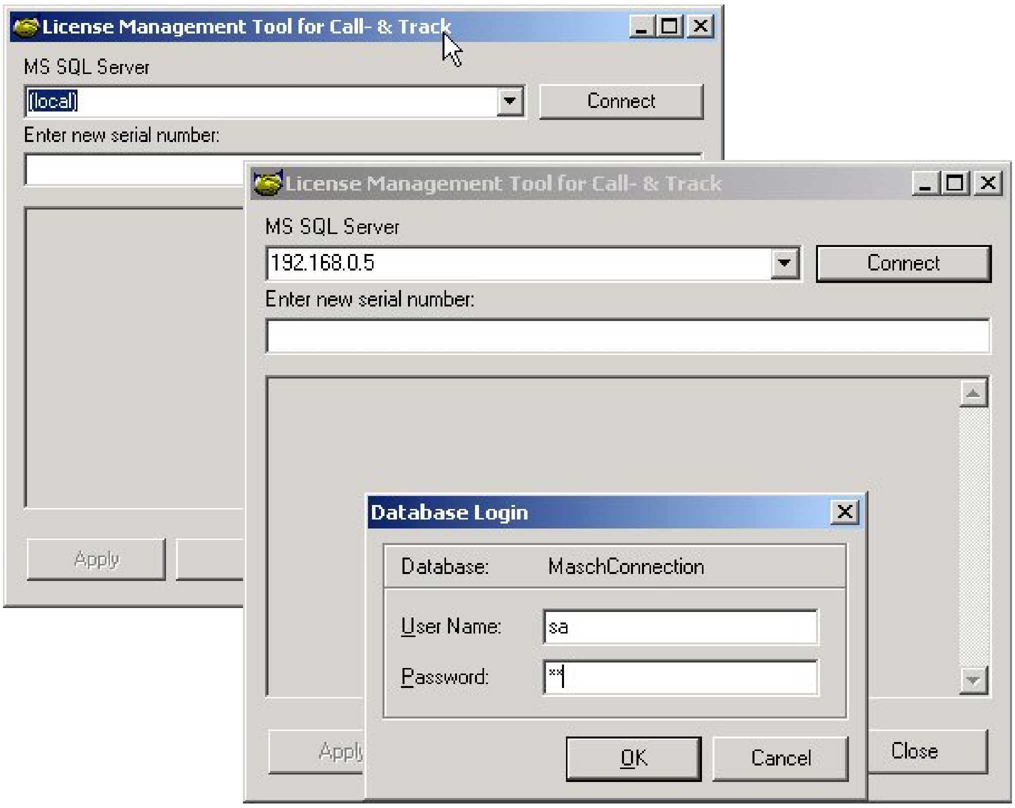
Please note the license limitations within the different versions of Call- & Track. They enclose an additional license agreement, installation instructions as well as the necessary serial number key.



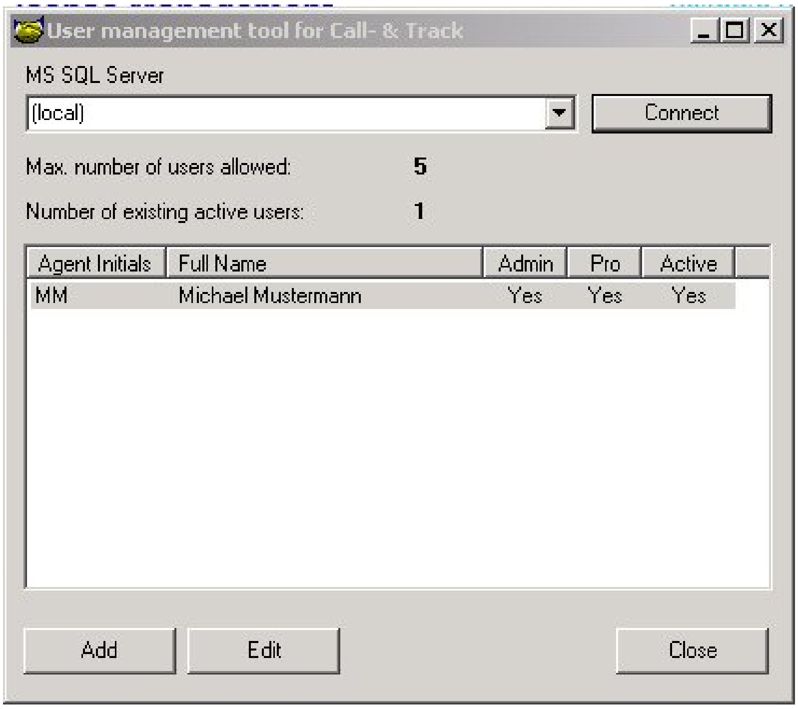
3.10 C & T User Account Manager



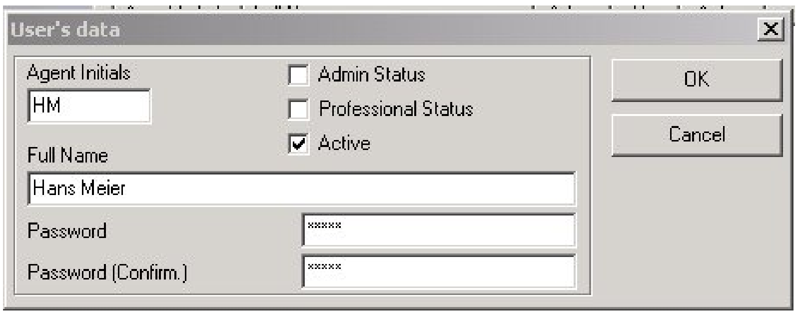
On selecting *User Account Manager* the following screen appears with the possibility to select the MS SQL Server and to establish a connection:



On logging on as administrator the maximal number of permitted and active users will be displayed.



Throughout the buttons *Add* and *Edit* you have the possibility to create new user accounts or to edit already existing user accounts.



After the final submission the executed changes are directly visible within the user account manager.

4. Launching the Software

Call- & Track is a real time based tracking software, which allows you to register the time, the service technician as well as the whole user setup. It gives you the opportunity to document the whole service request and is respective communication between the Customer and the service technician, so that in a multi user environment, every service agent within the IT department or at the service provider might be able to follow up a service request, which is tracked by anyone within the service group.

- Please launch Call- & Track, by double click on to the program icon: It will launch the login window of the Call- & Track desktop application.

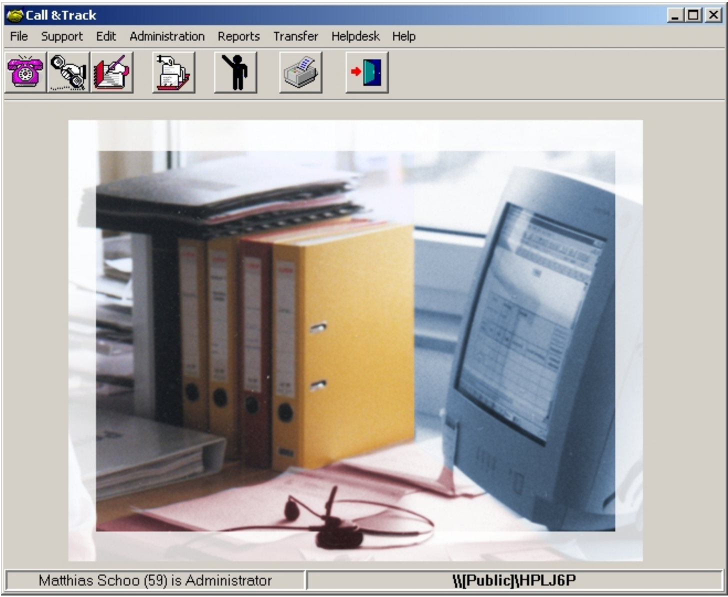
4.1 Login

Through the LOGIN window, each service technician must identify himself within the Call- & Track database software. You will be asked for your Login-ID (up to max. 3 Characters) and his Call- & Track user password. This dedicated login is necessary, so that each request can be tracked and linked unique to the service technician who entered the information into the system.

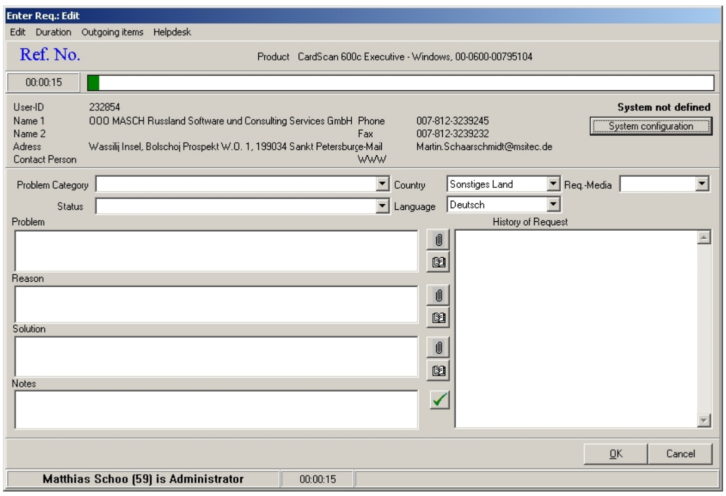
After entering your login ID and your password, please confirm your entries by clicking on to the button *OK*.

4.2 The main menu

After successfully starting the Call- & Track desktop application, you will see the following main screen, which contains all menu options of the Call- & Track software. More detailed information about the software functions, you might look into detailed descriptions within the following manual chapters.



Many of these Call & Track Track features were designed for a single workstation as well as for small companies concerning collaboration, efficiency and management of information. Other versions from Call & Track contain further features which support middle and bigger enterprises.



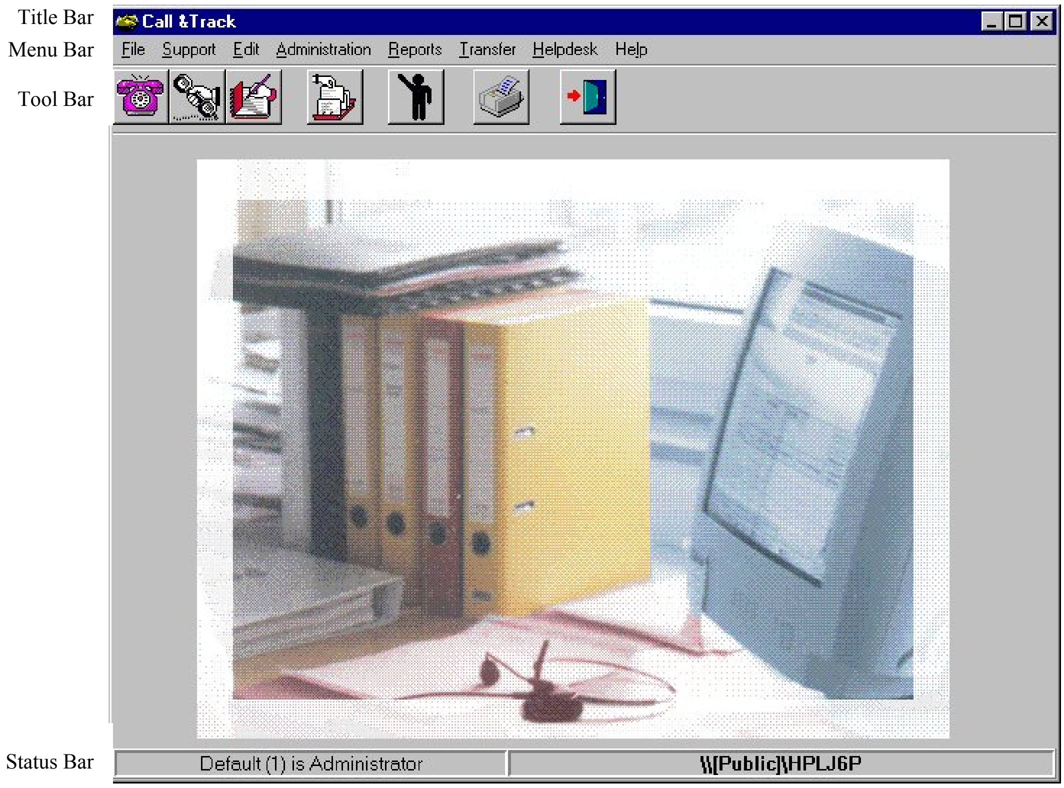
As soon as a function of the program is selected, a second window opens, so that the main window of the program remains always in the background and you have access to open a second request at the same time.

5 The Main Menu

The description of the program surface and the basic functions of the program Call & Track as well as the tracking of user's requests and the product administration are explained to you closer in the following chapter.

5.1 The Program Surface of C & T in the Overview

Every program running under Windows is carried out in its own window. These windows are called application window. The program surface makes a distinction between a title bar, menu bar, tool bar and status bar.



5.1.1 Title Bar

Every window owns a *title bar*. The title bar of the application window contains at first the name of the application *"Call & Track"*.

The buttons in the right corner also belong to the title bar. These buttons are used to change the appearance of the window as well as to close the program or document. The functions are in detail:

- **Minimize Window:** Reduces the current window to an entry in the Task bar
- **Maximize Window:** Enlarges the current window to full size: The window fills the whole screen except for the area of the Task bar
- **Reduce Window:** Reduces a window
- **Close Window:** Closes the current window

5.1.2 Menu Bar

With the *menu bar* you have access to the complete set of tools of Call & Track.

- **Shortcut Keys:** Many of the menu commands can be carried out alternatively with a key combination. The commands you need more often inside Call & Track can be carried out faster and easier.
- **Submenus:** Some of the menu entries show a triangle in the right edge. As soon as you point at such a triangle, a submenu is opened. There are further entries ready for your choice.
- **Activated (The box in front of the entry is checked):** A little hook before the menu entry indicates which settings have been selected.

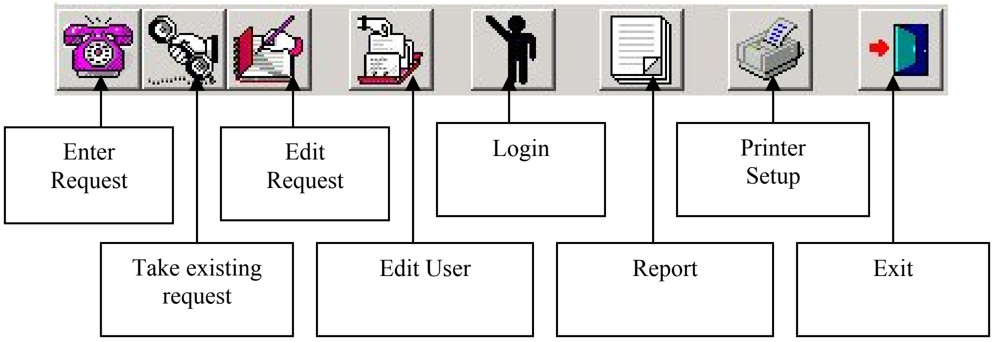
There are some specific features in the different menus which are explained below:

- **File:** The menu option *file* gives you the possibility to log in anew if necessary with another service agent ID, to set up the user interface, as well as to change settings of the program or the printer.
- **Support:** You find the Administration of user's requests under the menu point S*upport.*
- **Edit:** By choosing *Edit* you can edit the user's data or the stock of articles.
- **Administration:** In the menu option *Administration* you define all necessary base data, such as the requests and problem categories, national information and languages, system data, manufacturers and products.
- **Reports:** Via the menu option Reports you can select and print out various evaluations.
- **Helpdesk:** The *Helpdesk* assists you on getting quick information and opening forms.
- **Help:** Additional information to this program is offered to you under the menu option *help*.

5.1.3 Tool Bar

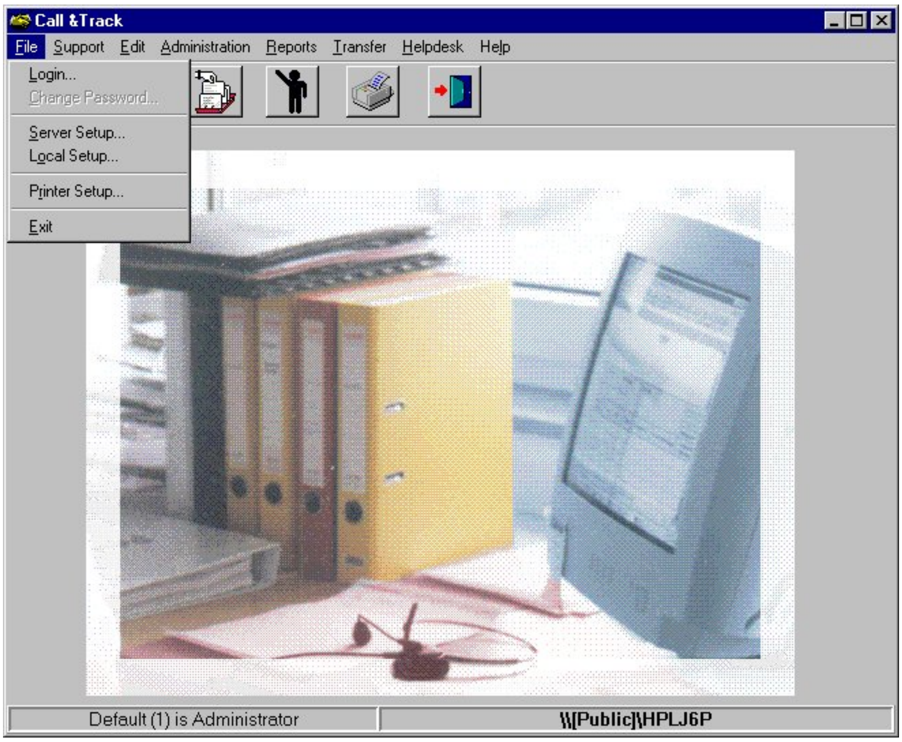
The tool bar has the job to show you a row of the most often required and used functions and commands for quick access by mouse click. The simple click on a symbol of the tool bar replaces the command via the menu; indeed, not all menu orders are available via the tool bar.

Call & Track has 7 functions for different jobs to start with



5.2 Files

The File menu is divided in six points: *Login*, *change password*, *server Setup*, *local Setup*, *printer Setup* and *Exit*. With a simple click on the option, the desired function starts.



5.2.1 Login

To log in with another Login-ID without closing the program and starting once more, choose the option Login in the menu File, then the Login window is shown.

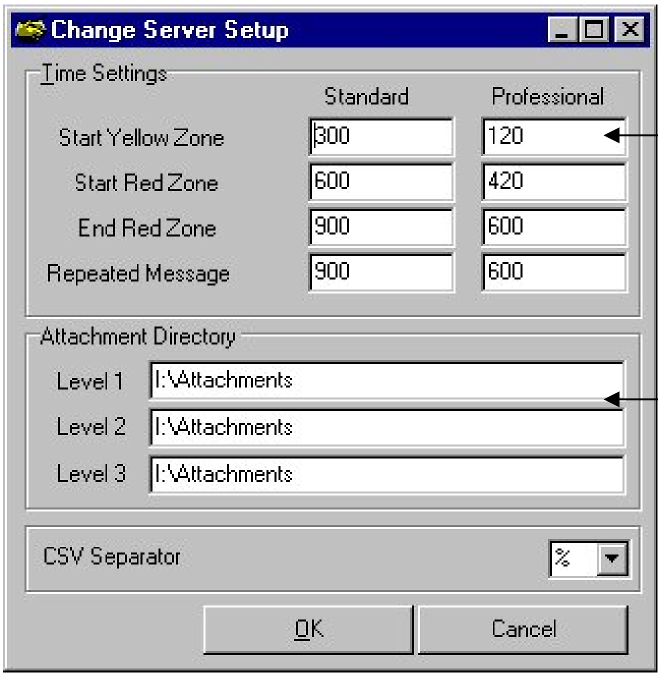
Fill in the fields the initials of the agent and the password and click on OK.

5.2.2 Change Password

This function is supported only in the multi-user-versions 5.1 and 5.2. Here you have the possibility to change the password (*only with administration rights*).

5.2.3 Server Set-up

Under this point in the menu you can change the settings for the server (time settings, Attachment Directory as well as the separator CSV).



You can adjust the time settings individually by entering the desired time (in seconds).

The option Attachment Directory defines the folder, where the Archive is stored. To change the location of the Archive, enter the respective path into the fields.

In order to work on the user's inquiries efficiently, you have the possibility to set the time of the inquiry treatment. 2 options are available to you: *standard* and *professional*.

Please note that this functionality is only useful in the multi user environment with several Call- & Track service agents, because in a single user environment the only user is classified at the same time as an administrator and therefore as a professional User as well.

In the multi user environment, especially if you do phone support and service, Call- & Track makes a distinction between a standard or level 1 agent and the experienced professional or level 2 agent.

Within the screen *Enter Request* appears a time beam which changes from the color green to red depending on the passed time. As you can read in the next chapters of our manual, this time beam serves for the optical orientation of the service agent to see in which time frame the treatment of the request is still to be judged as efficient.

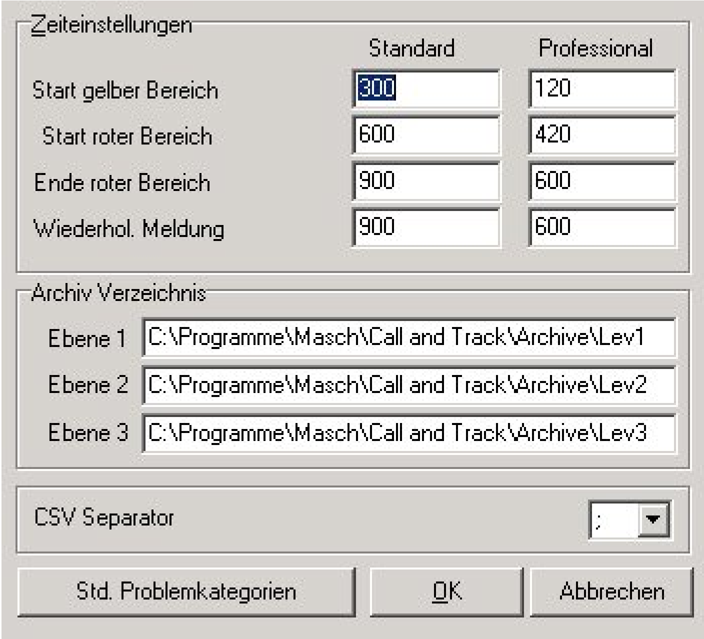
You can define the time frames yourselves, as you can see in the picture *Change Server Setup*:

- *Standard* classifies in the multi user environment, as already mentioned, the Level 1 agent. Here you can set an orientation time for the Level 1 agent in which he should finish the service request in order to work efficiently and profitably under all costs and application aspects.
- The option *Professional* serves for the classification of a Level 2 agent from whom one can expect as a rule shorter and more efficient processing time.

Of course, you can use the definition following your own concepts, while you cover all Level 1 agents with shorter time default, because only the simple problems should be solved by a standard or Level 1 agent and therefore the time involved should be less. However, more time can be allowed for the professional or Level 2 agent, because he must work on the difficult and therefore protracted problem cases.

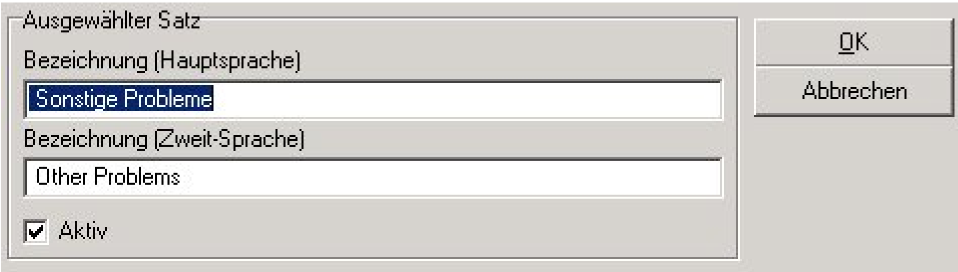
You see at this simple example that Call- & Track offers you a multitude of configuration possibilities to tune the service work individually to your needs.

With the *CSV separator* you define the separator which Call- & Track uses to create the export or report files. The accompanying functions are described within the chapters *report* or *transfer* in this manual in detail.



By clicking on the above shown button „Std. Problem Categories“, you can add or modify the default problem categories of Call- & Track. The below shown problem categories …

... will be assigned each new product, which you will add into the system (see chapter 5.4.10), as long as you will activate this problem category by using the dedicated check mark there for as shown in the screen below:



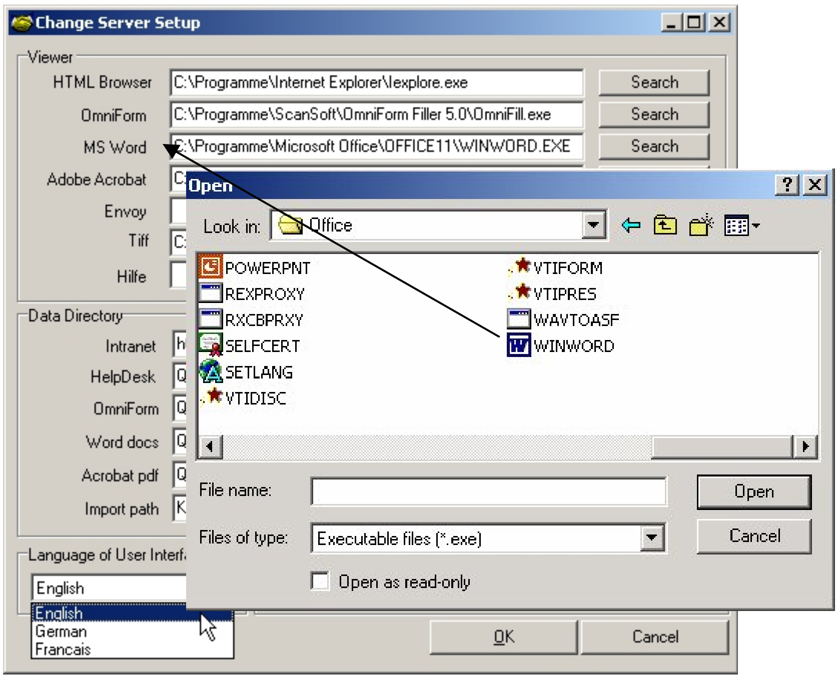
By clicking on the button „OK“ you will save and close the data entry for the standard problem categories.

5.2.4 Local Setup

In the menu *Local Setup* you can choose the programs for viewing the different file formats, the places where the form templates are stored as well as the temporary directory of the archive of printer and the language of the user interface. It is very important to set the respective reference paths and start directories correctly, so that you can start the necessary programs and open the forms during the inquiry treatment quickly.

To change the reference paths and start directories:

1. Select one of the form options, with a click on the button *Search*.
2. In the opening window the predefined start directory is shown to you.
3. Open the respective start directory and click on the button *Open* to confirm the information.

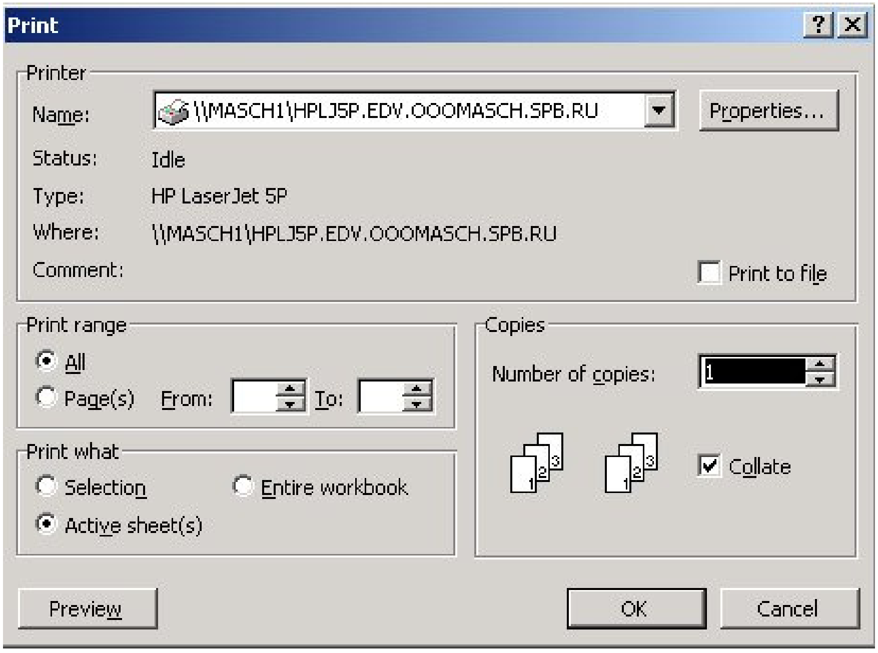


Here you can also set the language of the User Interface, by choosing the language from the Drop Down list.

The option *Local Directory for archive printer* determines the location of the archive printer. If you have changed the location, enter the new path in the field.

5.2.5 Printer Setup

If you select the option *Printer Setup,* you see the window for setting up the printer. Here you can view or change the settings of the default printer.

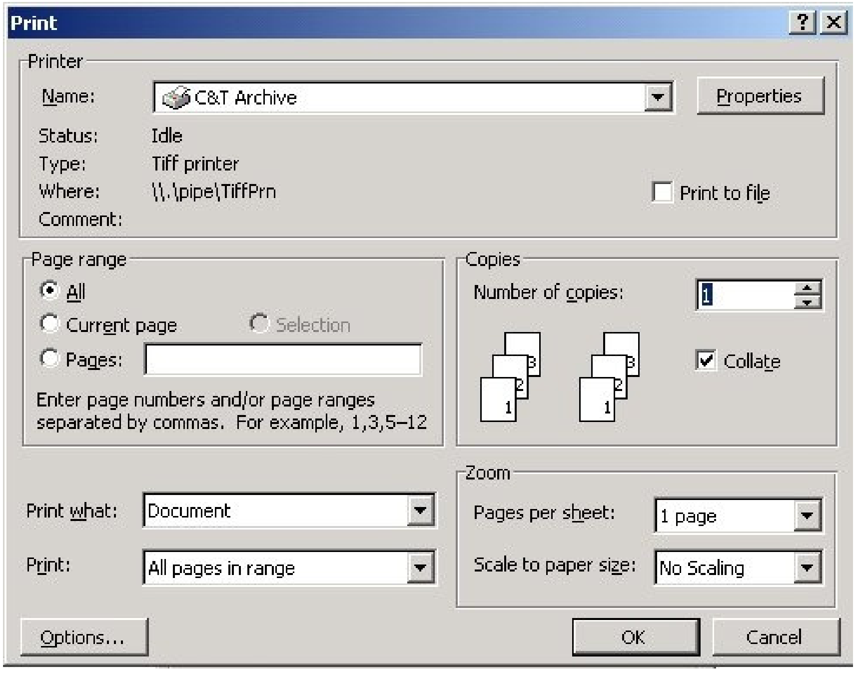


From Call & Track you can print out the documents (e.g., a report) on a paper printer. The C&T archive printer is also available to you. With the help of the C&T archive printer you can save and attach the documents (e.g., eMails, forms) in the archive.

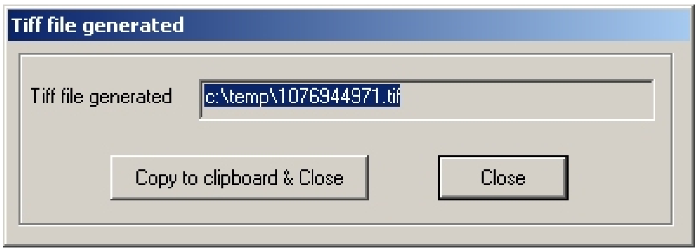
To print a document with the Call & Track archive printer:

1. Open the file to be printed out
2. Select in the program menu the option *Printing*

3. In the printer setup window you choose *Call & Track archive printer and* click on *OK*.



4. Click in the following window the button *Copy to clipboard & Close* to copy the file name and close the window by clicking *Close.*



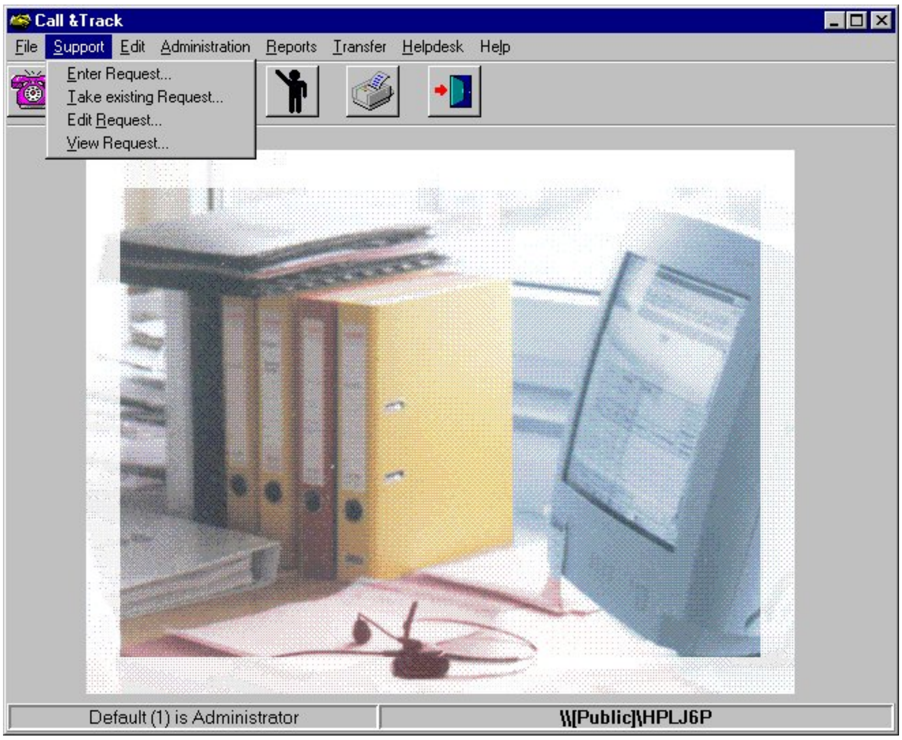
5. You can attach the document with the key combination Ctrl + V (e.g., to an inquiry).

5.2.6 Finish

Use this option to exit the program.

5.3 Support

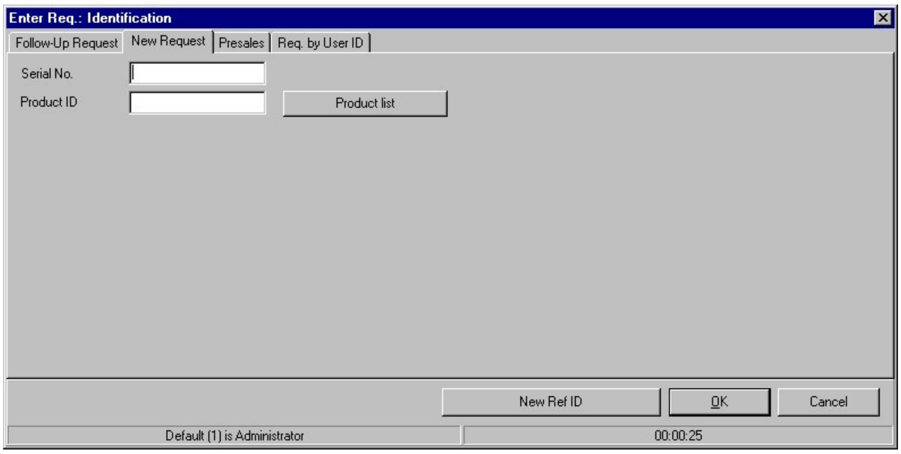
The menu Support divides in four options: *Enter Request, Take existing Request, Edit Request* and *View Request*.



The option *Enter Request* is used to register a New Request. With the option *Take existing Request* you can take over a request which you have already entered. The option *Edit Request* allows you to edit a request which has already been entered before. Choose the option *View Request* if you want to look at a request which you have already entered without the option of editing request.

5.3.1 Enter Request

If you select in the menu Support the option *Enter Request* or click on the corresponding symbol (see on the right), the following window opens.



This menu has the following menu points:

- **Follow-Up Request:** Work on a request with existing reference number.
- **New Request:** Enter the arriving requests which represent a new problem.
- **Presales:** Enter questions of a user before he bought a product.
- **Req. by user ID:** Work on a request with known user ID

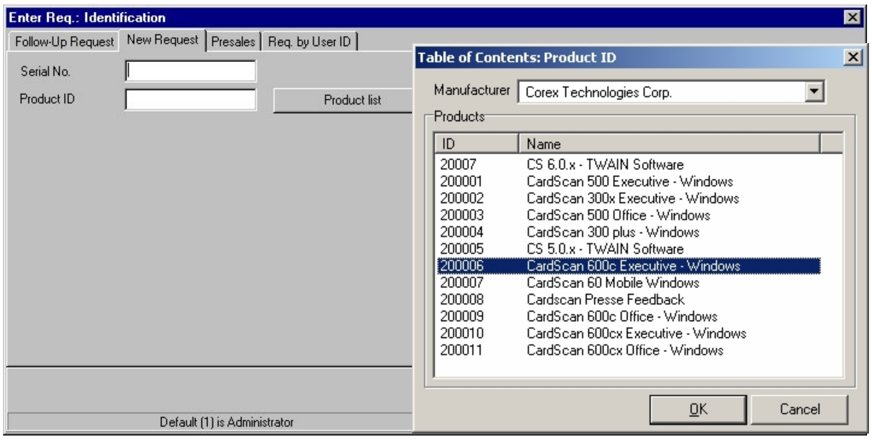
In the selection window choose the correct tab to edit a request.

5.3.2 Enter New Request

With this function a new request arriving to a user opens with an "empty" request mask.

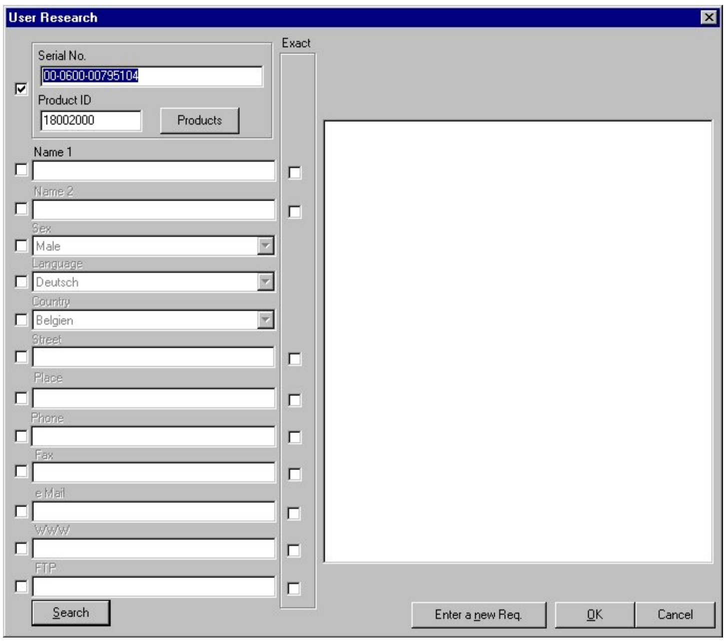
To enter a new request, follow these steps:

1. Select the tab *New Request*. A window for entering the request opens.

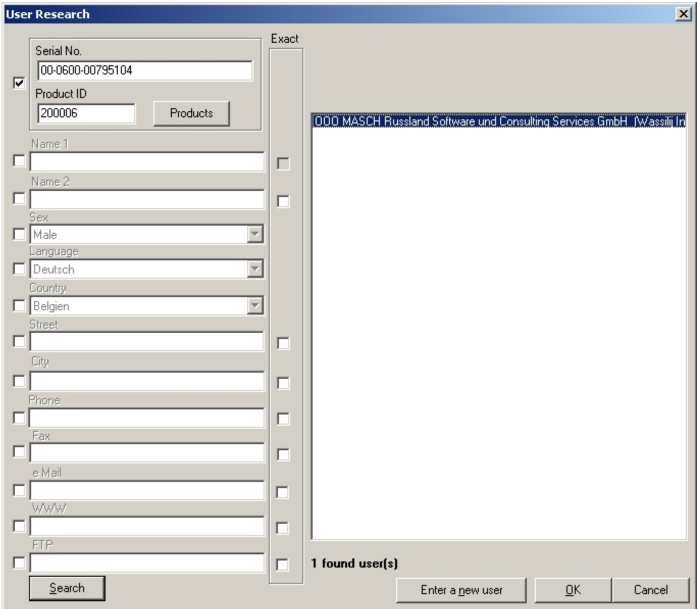


2. Enter the serial number and product ID or click the button *Products* and select the product from the list. Click *OK,* to confirm the data.

3. Click the button *Search* to check if a user with this serial number already exists in the data base.

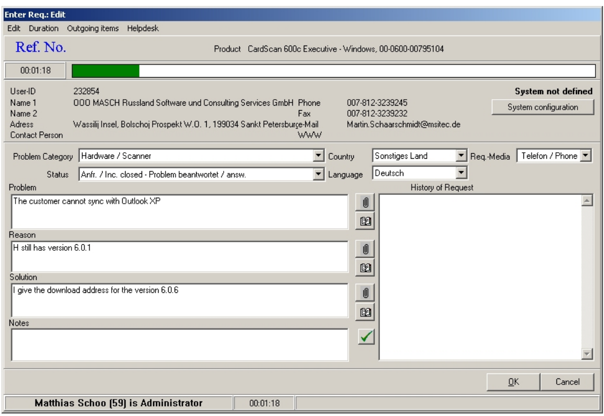


4. If a user with this serial number is already entered in the data base his data is shown on the right. Highlight the record with the mouse and click *OK*.



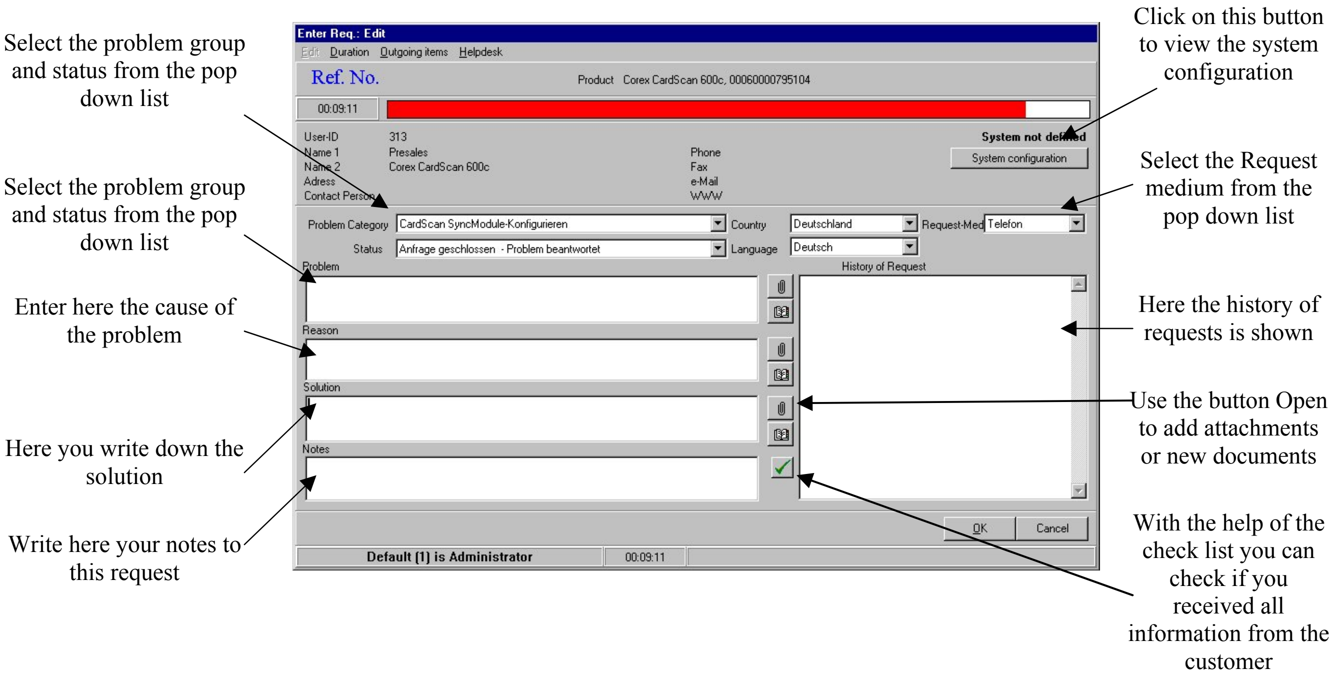
5. You can also create a new user by clicking the button *Enter a new request*.

6. After you have selected or entered the user a window appears, where you can enter the request. Write down the information in the corresponding fields and select the problem category, the status and the request media. Click OK, to store the request. The reference number for this request will be shown in the next window. With this reference number you have any time access to this request in order to view existing data or to change it.



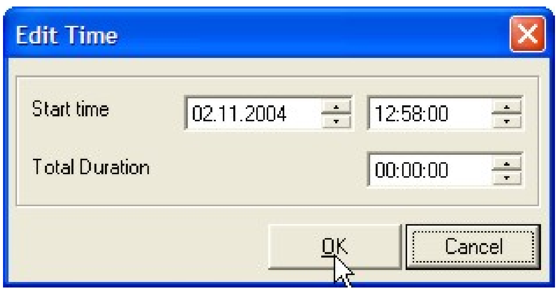
5.3.3 Edit Request Window

The Edit Request window allows you to edit the user's requests efficiently; you find here all data of the request already known and you can add new information.



In the upper menu bar of the Window four options are available to you:

- Under *Edit* you can view or edit the user's data.
- Under the option *Duration* you can edit the time of the demand. You can correct the *Start time* in the date and the clock time fields as well as the *Duration time* in the field Hr:Min:Sec. In order to save the changes, click the button *OK*.



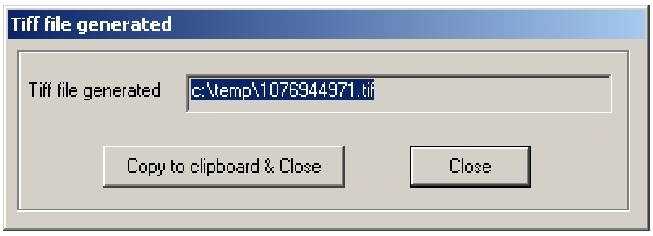
- The option *Outgoing Items* allows you to administrate articles without closing the Edit Request window.
- Via the option *Helpdesk* you can reach the Helpdesk directly from the Edit Request window.

In the centre of the Edit Request window the user's data (address, phone, fax, email and user's language), the user ID as well as the product are shown to you. The time bar serves to optimize the processing of the request. According to your settings the time bar is marked green, yellow or red.

If you send documents to the user or receive documents from him while working on the request, you can add these documents to the request or open already saved documents. For this you can use the buttons on the right near the text fields *Problem*, *Cause* and *Solution*.

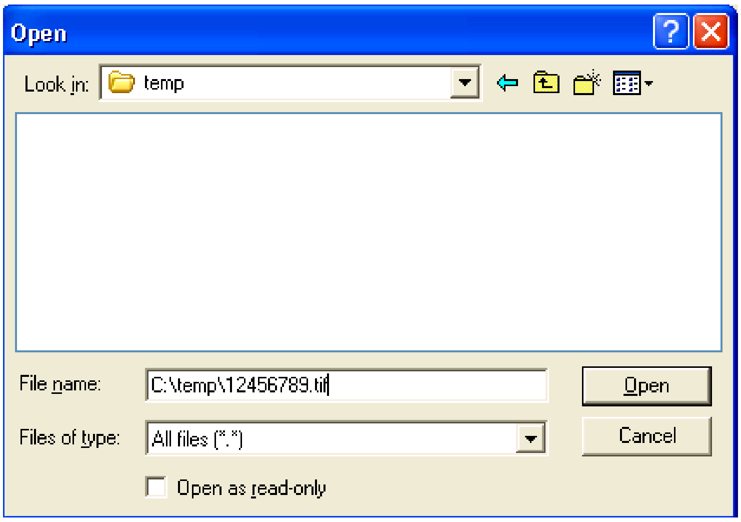
How to add the documents to the request:

1. Print the documents on the C&T archive printer by choosing C&T archive in the printing window.

   Click the button *Copy to clipboard & Close* to copy the file name and close the window by clicking on the button *Close*.

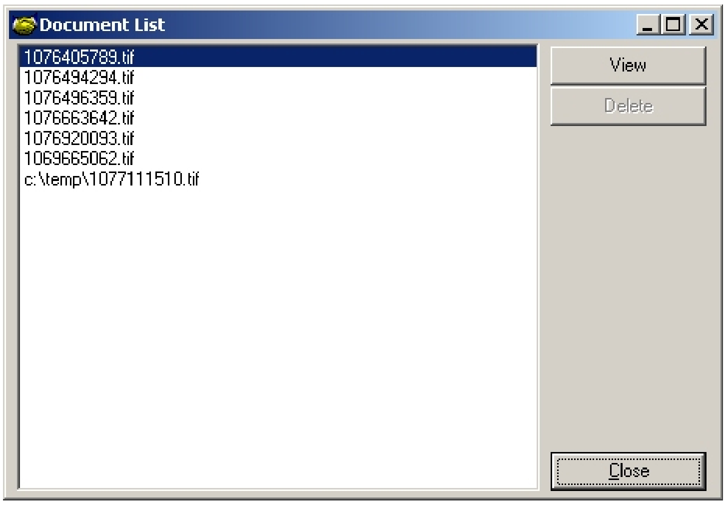
2. Click the button right to the field problem, cause or solution in the Edit Request window to attach the file. The file selection window is shown.

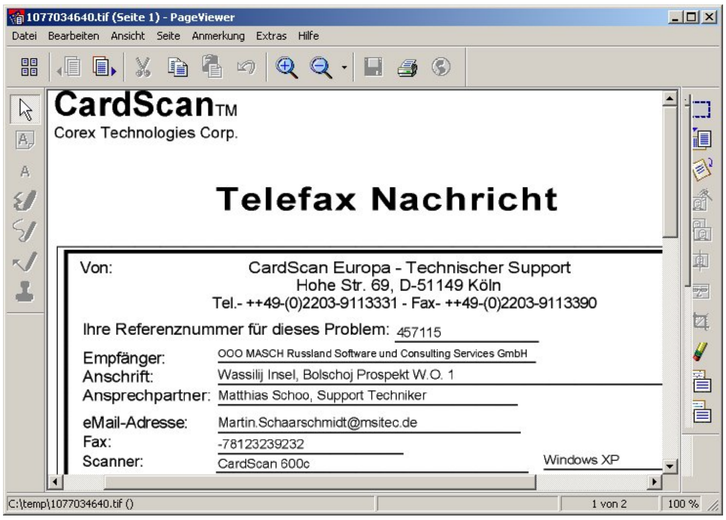


Put down here the file name, while you press the key combination Ctrl + V on your keyboard at the same time.

3. Now click on *Open* to add the file; it is stored in the Call & Track archives.

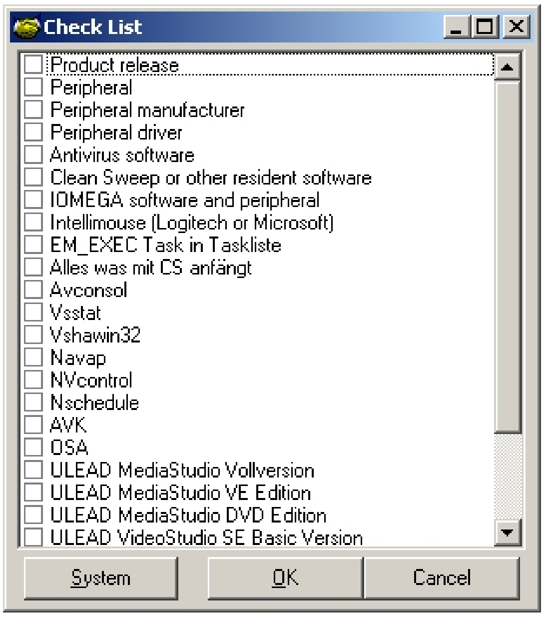
You can look at the attached documents any time, by clicking the button *Open* on the right near the text field where they are shown. The list of the documents is shown.





Highlight the file and click on the button *View* to open the file or on the button *Delete* to remove the file.

The Edit Request window has also a check list for you. To open the check list you click on the button near the text field *Notes*. The following window appears:

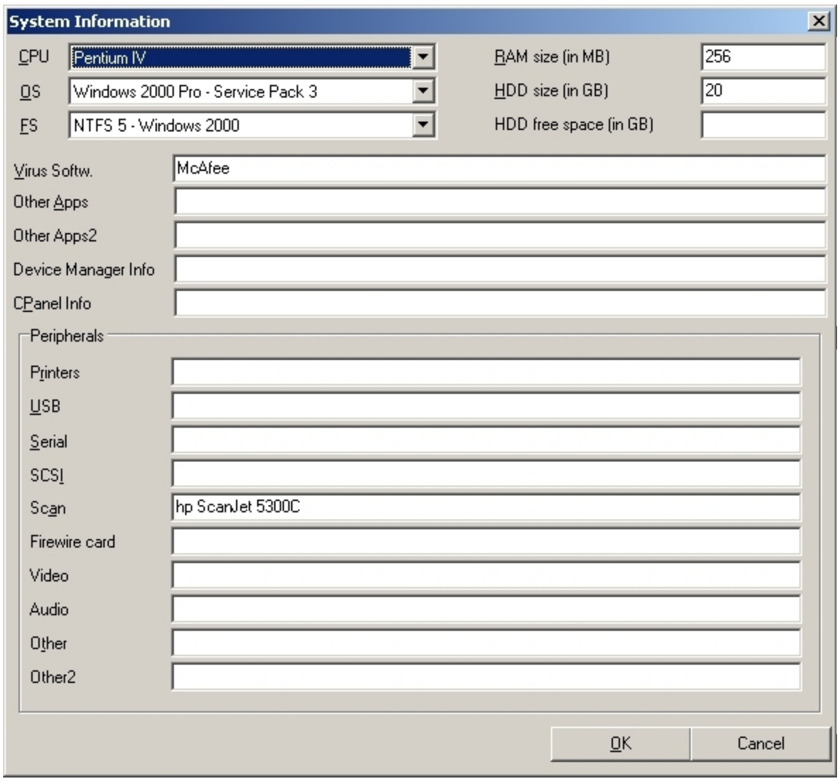


Here you can check whether you have asked the user all necessary information and check the corresponding check boxes. If you wish to view or edit system data click on the button *System*.

5.3.4 System configuration-Window

By clicking the button *system configuration* you can register or view the complete system configuration of the user.

Processor
Operating system
Hard disk-file system



Internal memory RAM
Hard disk size
Free space on the hard disk
Anti-viruses software
Installed software on the PC
Graphic card, sound card, driver
Printer
Devices connected via USB or parallel port
SCSI card and driver
Devices with Firewire card
Video camera
Audio devices
Other devices used by the user

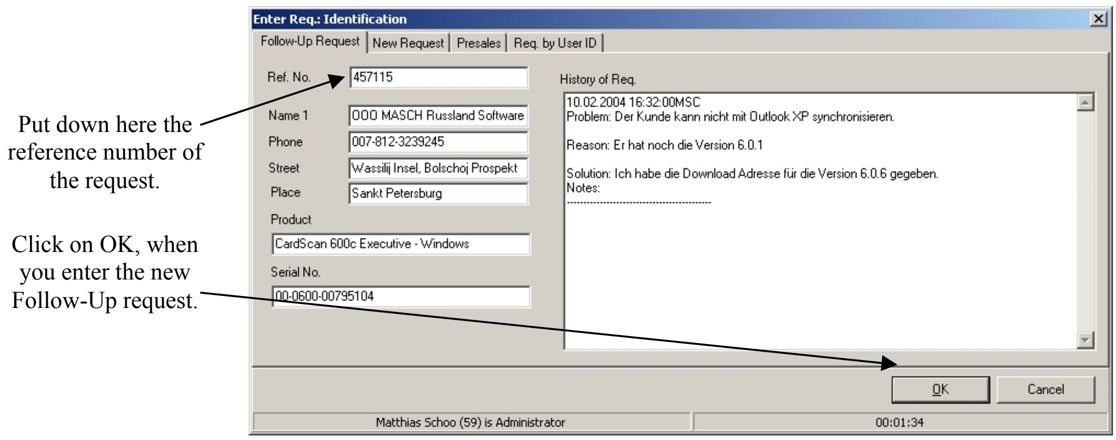
Choose the necessary data (processor, operating system, file system) from the drop down list and put down the information about the hard disk size, used software and connected devices on the corresponding fields. Click OK, to save the information and to close the window.

5.3.5 Follow-Up Request

This function serves for the capture of the Follow-Up requests of the users with existing reference number.

To enter a Follow-Up request you perform the following actions:

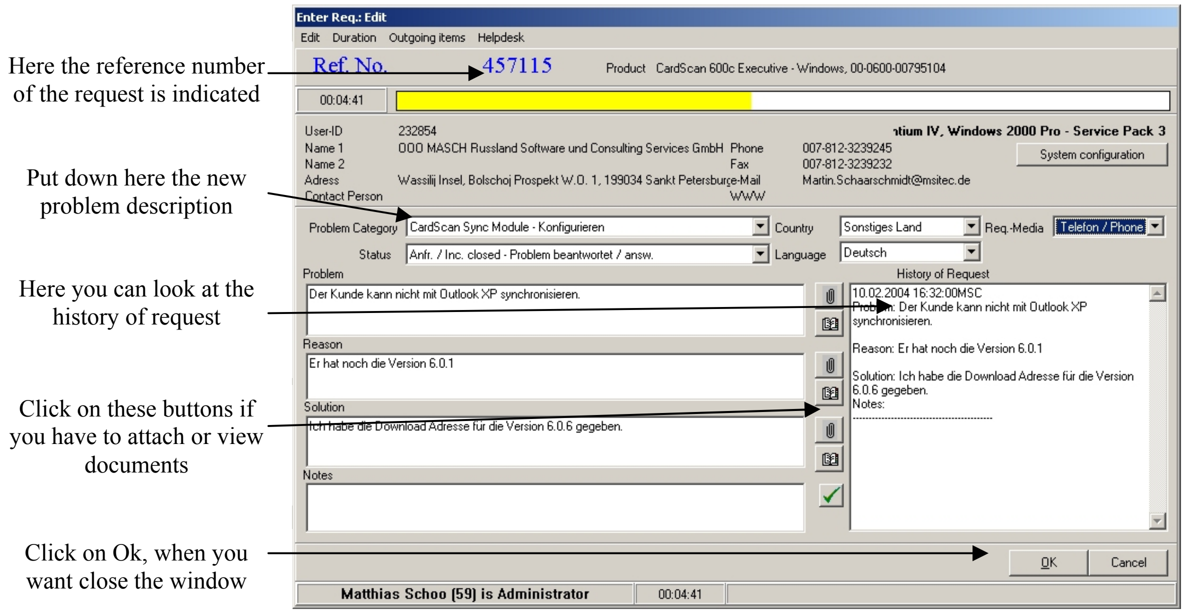
1. Choose in the menu *Support* the option *Enter Request* and in the indicated window the tab *Follow-Up request*



2. Enter in the text field *Ref. No.* the reference number of the request. Then the system shows you the user's data and request history.

3. Click on *OK,* when you want to register the Follow-Up request with this reference number.

4. The edit request window appears in which the reference number of the problem and the request history are shown.



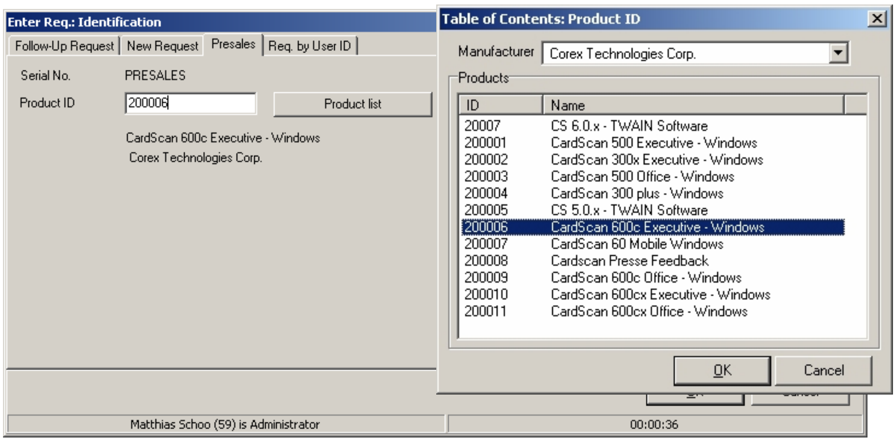
5. Write down the information in the corresponding fields and click on *OK,* when you want to save the data.

5.3.6 Register Presales

In Call & Track you can register the requests of users who do not own the product yet but need temporary information about the product.

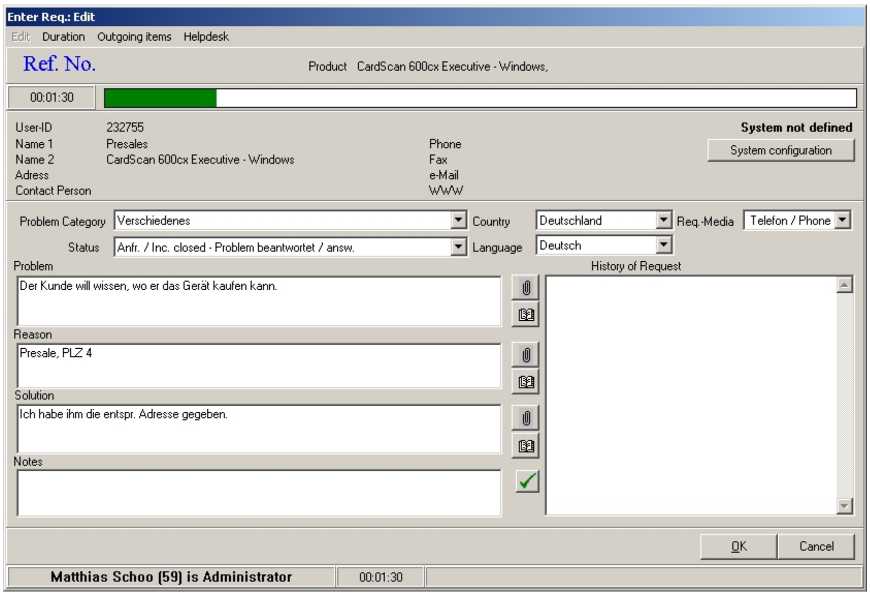
To register a presales request you perform the following steps:

1. Choose in the menu *Support* the option *Enter Request* and then the tab *Presales*.



2. Enter in the text field *Product ID* the product number or click on the button *product list*. A window with the list of products appears. Here you can select the manufacturer from the drop down list and the product.

3. Click on OK, to open the edit request window and to register the request. Enter into the fields Problem, Cause and Solution the description of the question of the customer and your answer or solution to the problem, select the problem category and the request status and click OK, to save the information and to close the window.

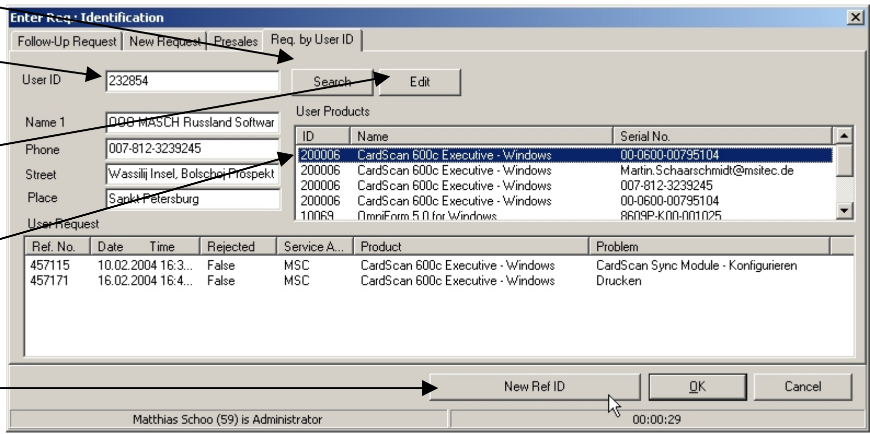


5.3.7 Request user ID

In Call & Track every user receives a user ID. It is possible with a known user ID to register the request directly without having to search the user in the data base.

To register a request with user ID you perform the following steps:

1. Choose in the menu *Support* the option *Enter Request* and then the tab *request by user ID.*

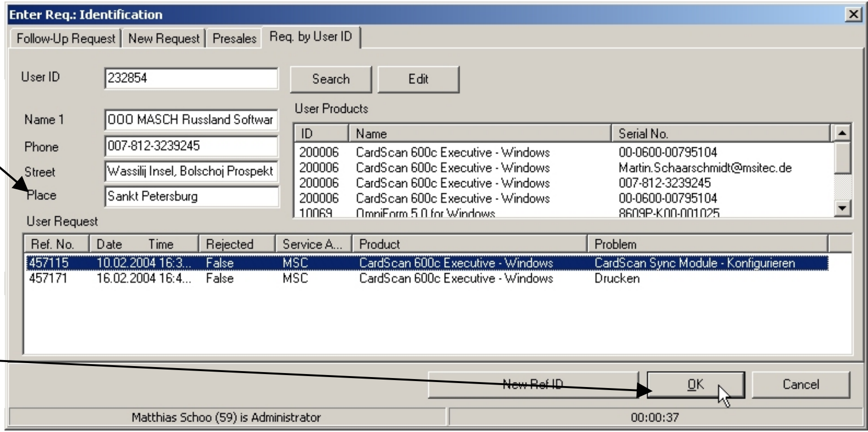


2. Enter in the field *User ID* the user ID number. If do not have a user ID, you can look for it, by clicking on the button *Search*.
3. After you have entered the user ID, the customer data are shown to you including available products and existing requests.
4. You can view here the user's data and edit by clicking the button *edit*.
5. Select the product from the list and click on the button *new Ref No* to register the new request with a new reference number.

6. If a user has a Follow-Up request, you can highlight the request below in the list of the available requests with the mouse and click afterwards on *OK,* to register a new request under this reference number.

Highlight with the mouse the request in the list if you might enter a Follow-Up request under this reference number

Click on Ok to continue the process



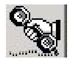
7. The edit request window appears in which you can enter the new request of the customer.

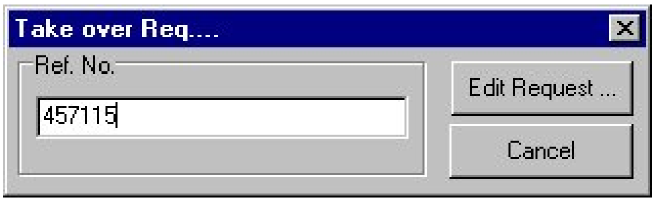
5.3.8 Taking over an existing request

Here an already registered request is forwarded verbally to an engineer's colleague, while you inform him/her about the reference number of the request and then close the request again. The takeover of a request generates no new mask, but simply continues the already registered data and in particular the already counted time measurement. The request can be taken over only during the same day.

To take over a request you perform the following steps:

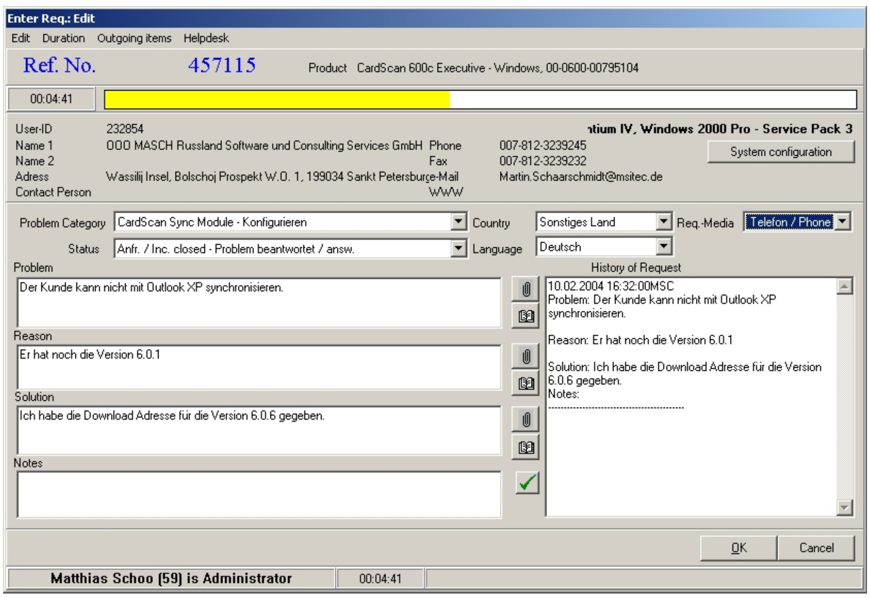
1. Choose *in the menu Support* the option *Take existing Request* or click the corresponding button (see on the right), the following window appears:





2. Enter here the reference number of the request and click *edit…* to take over the request.

3. The window Edit Request appears and you can now work on an already existing request.

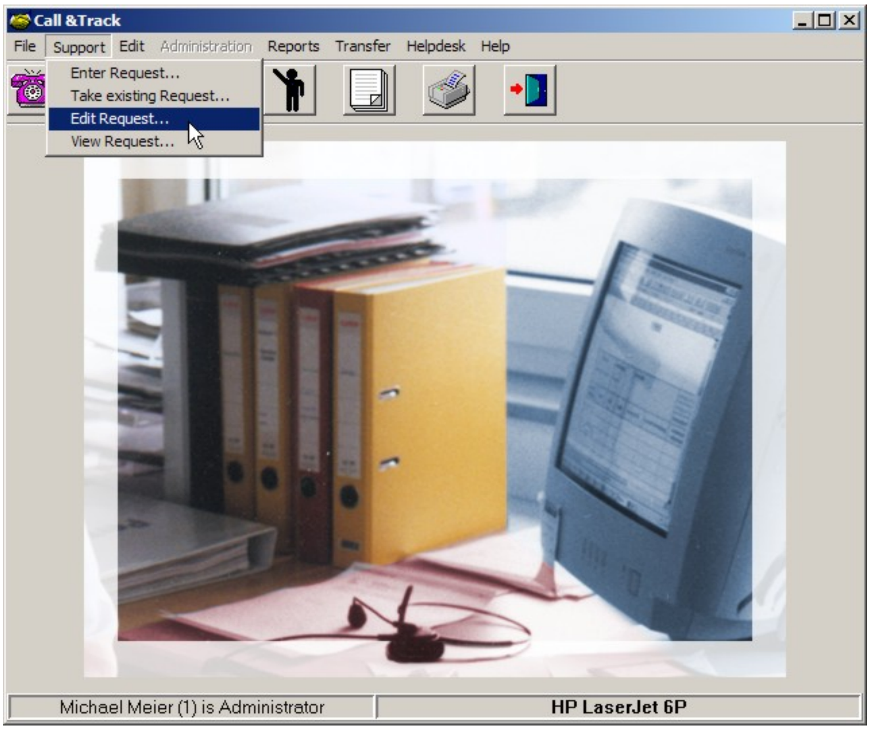


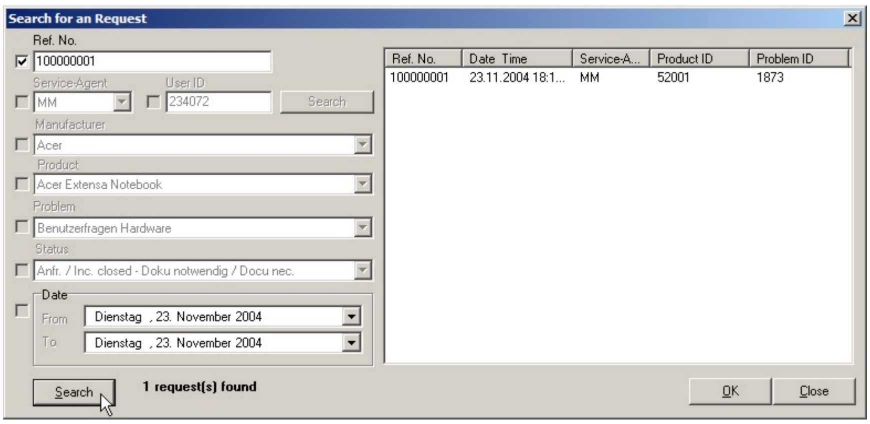
5.3.9 Edit Request

For the additional edit of an existing request you can use the option *Edit Request*.

You can edit a request with the following steps:

1. Choose *in the menu Support* the option *Edit Request* or click the corresponding button (see on the right) and you receive the following window:

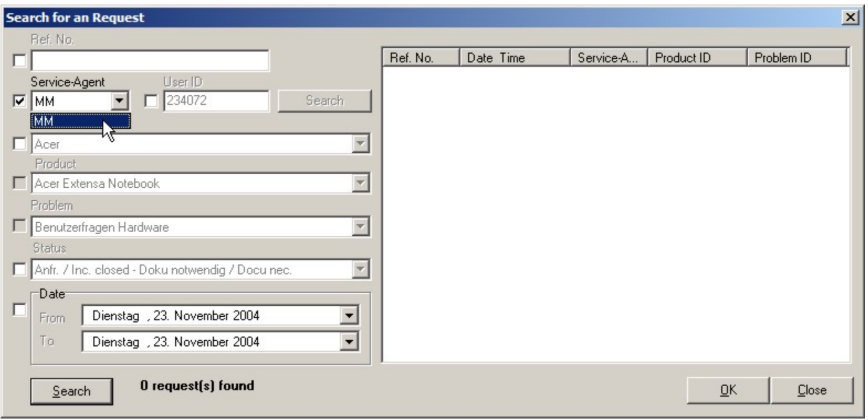




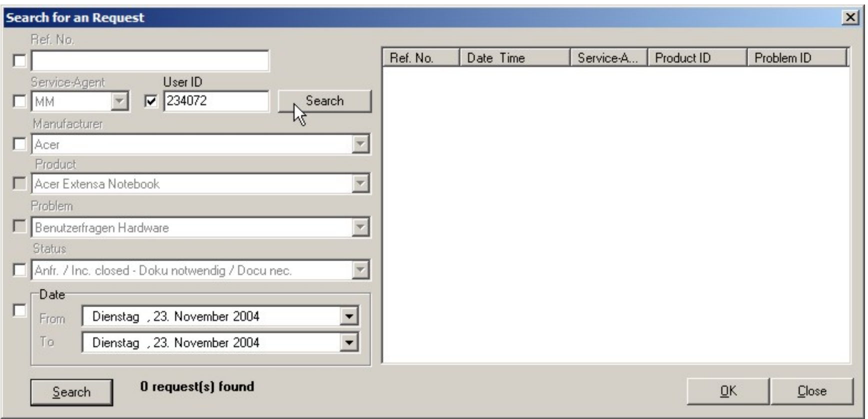
2. Within this window a huge number of searching criteria is available to you to the selection of the requests which you have entered and want to edit. On this occasion, primarily, you should fall back naturally on the reference number of the request. Nevertheless, there is also the possibility to use the remaining searching criteria with each other combined.

3. Enter the reference number of the request and then click the button *Search*, on the right all requests with this reference number will be listed to you.

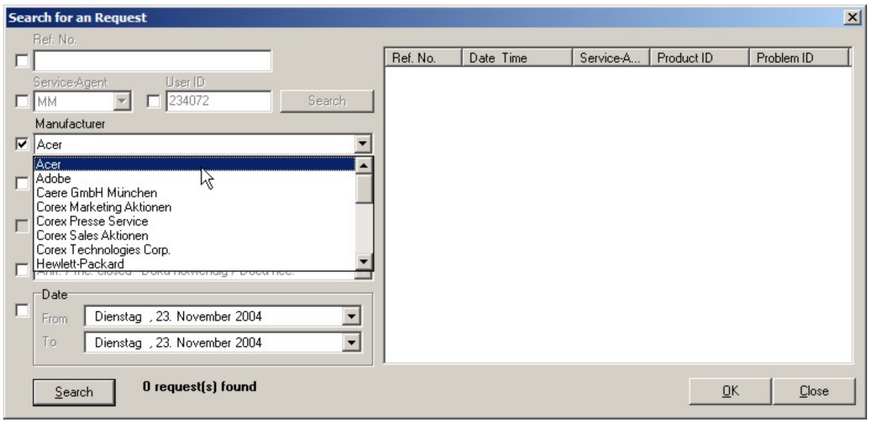
4. Click the check box near the field *Service-Agent*, and you will get a listing of all requests this engineer has handled.



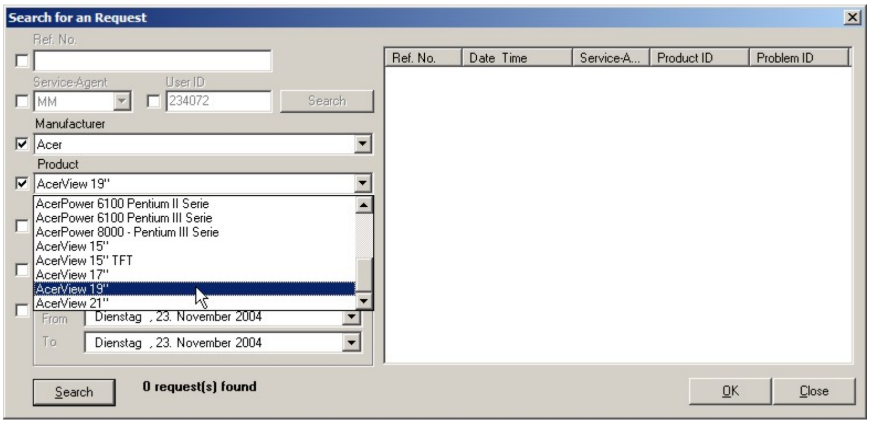
5. On selecting and entering the *Agent ID*, you'll see the list of the related demands.



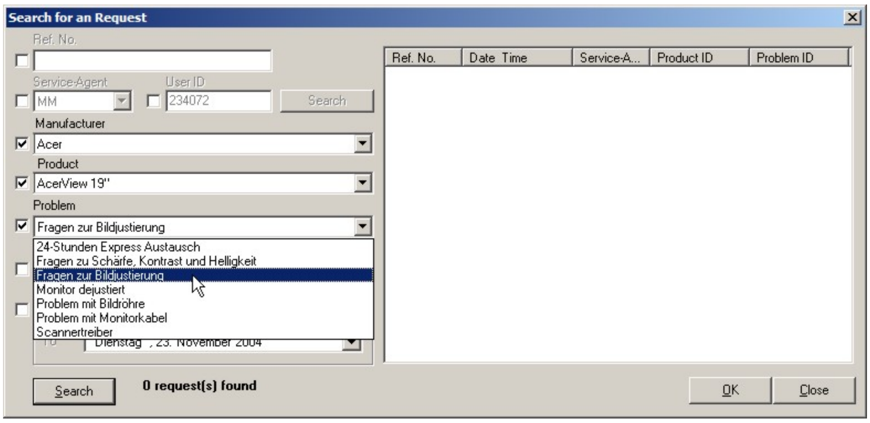
6. You can also search for all requests by a certain manufacturer. Activate the check box *manufacturer* and select the desired manufacturer from the drop down list



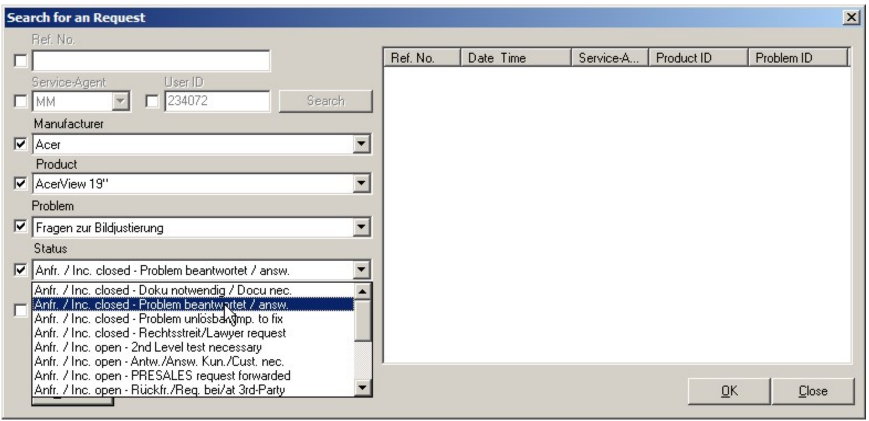
7. To receive a list of all requests by a certain product you activate the check box *product*.



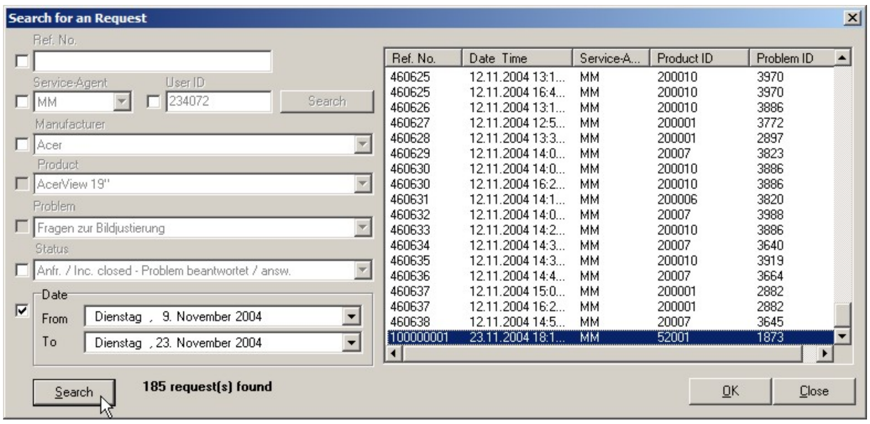
8. You can combine the searching criteria also under inclusion of a problem category



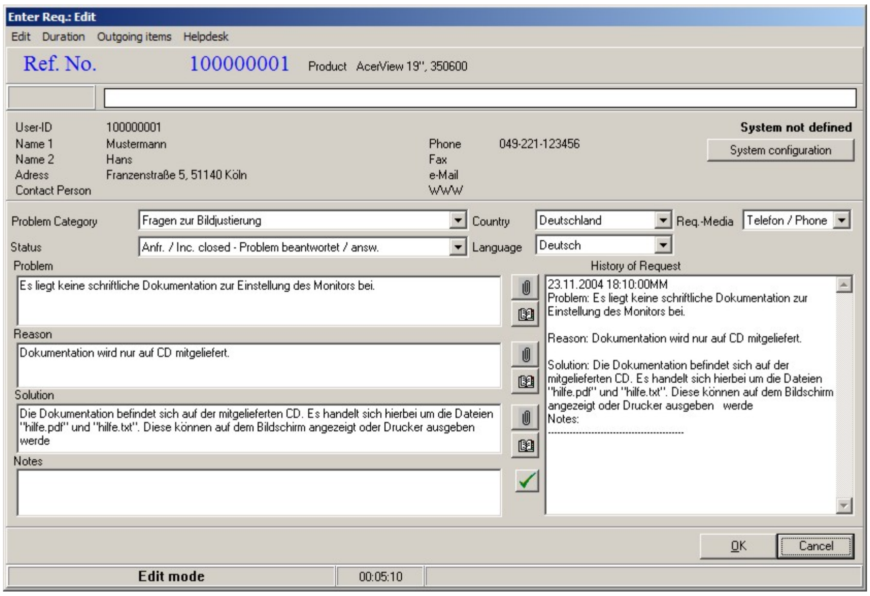
or the request status.



9. The option, to limit the period of the requests being searched, is also available to you. Activate the check box *Date*; select the date from the drop down list. Press the button *Search* to receive the listing.



10. Choose with the mouse a request which you want to edit and click *OK,* to open the request. The Edit Request window in which you can perform the changes appears.

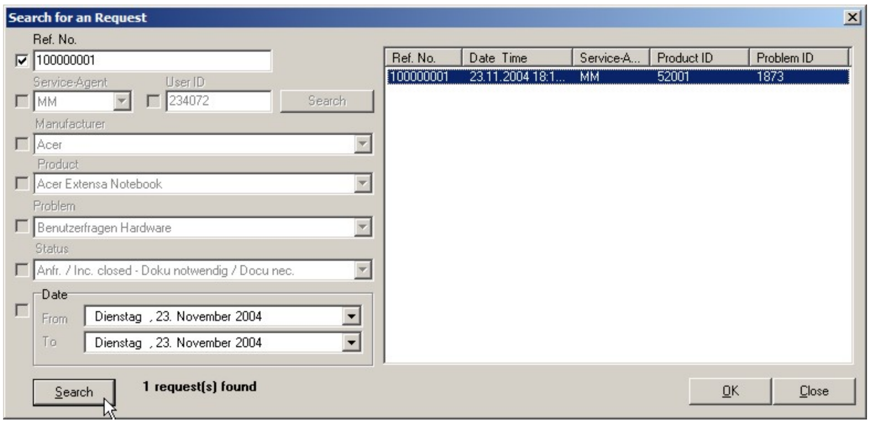


5.3.10 View Request

Via the option *View Request* you have the option to take a look in a request without being able to edit it.

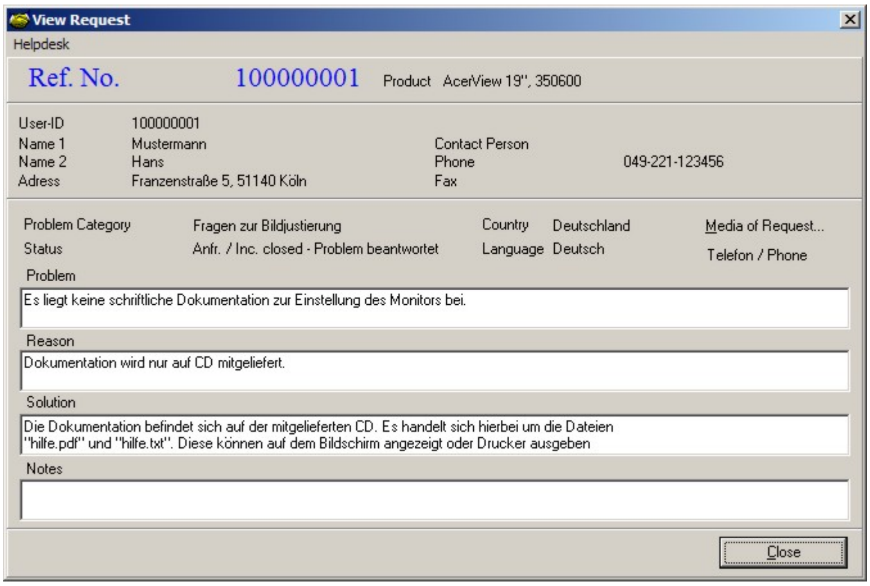
You can look at a request by performing the following steps:

1. Choose in the menu *Support* the option *View Request,* the following window appears:



2. Enter the reference number of the request or search the request according to the mentioned search criteria.

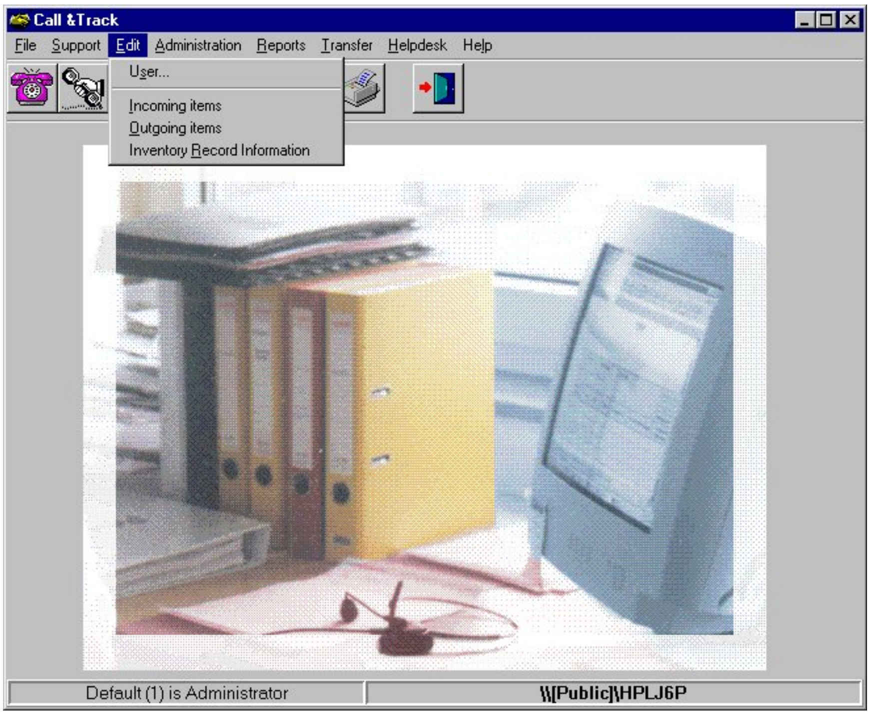
3. Highlight with the mouse the request you might consider and click on the button *OK*. The following window appears:



4. You can view the information here and also branch out into the Helpdesk.

5.4 Edit

The menu bar *Edit* divides in four options: *User, Incoming items, Outgoing items* and *Inventory Record Information*.



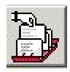
The option *User* is used for searching and editing the data of a user. Three further functions *incoming items*, *outgoing items* and *inventory record information* enable you to edit the master data for the spare part management.

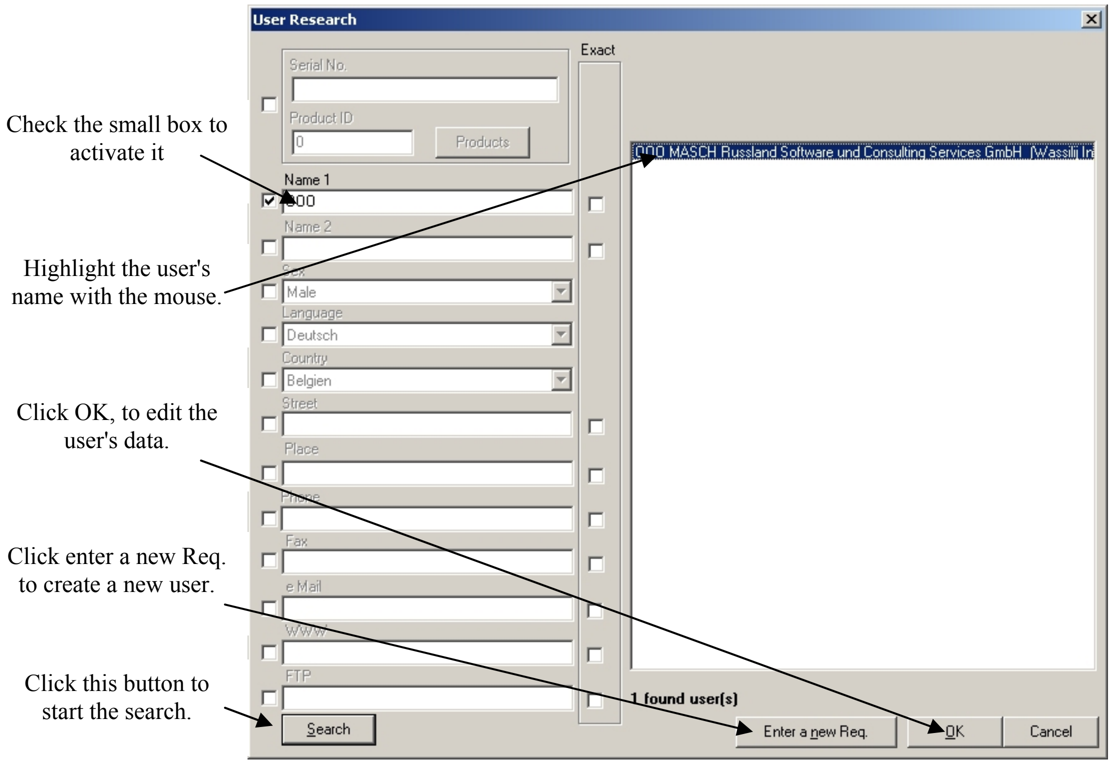
5.4.1 User

The option *User* serves for the maintenance of the regular clientele. You can look here either for registered users and edit available information, or create a new user.

To find a registered user or to create a new user, perform the following steps:

1. Choose the option *User* in the menu or click the button, the following window is shown:



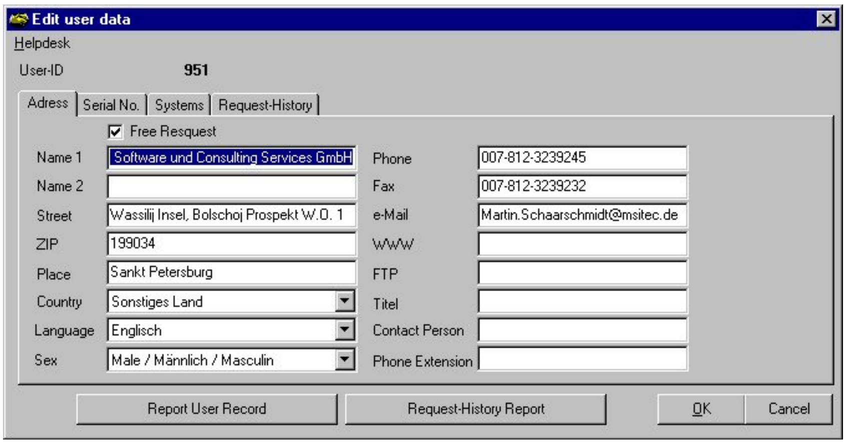


2. Within this search window a huge number of searching criteria is available to you for the selection of the user. On this occasion, primarily, you should fall back on the name of the user or the serial number of the product. Nevertheless, there is also the possibility of combining several searching criteria with each other.

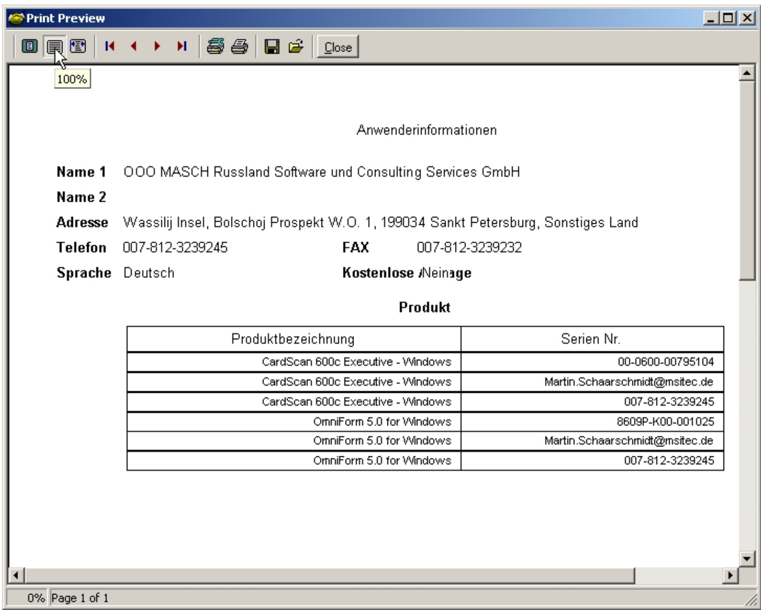
3. Click with the mouse in the check box to activate it, write down in the field the data and click the button *search*.

4. If the user exists in the data bank, his data are shown on the right. Highlight with the mouse the shown name and click the button *OK,* to open the screen with the user's data.

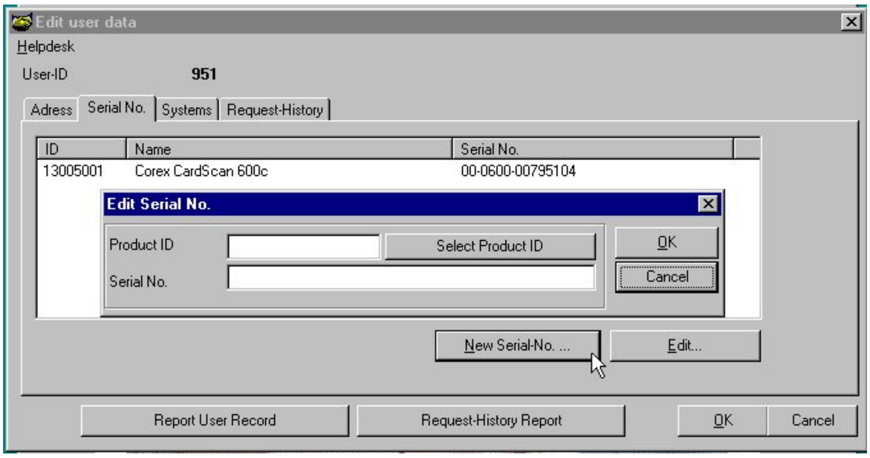
5. To create a new user, click the button *Enter a new Req.*, thereupon you receive the following customer data screen:



6. Write down here the name, the address and phone number of the user, please note that the phone and fax number should be entered according to the following syntax: "nationalcode-town-number", e.g., 007-812-3239245.

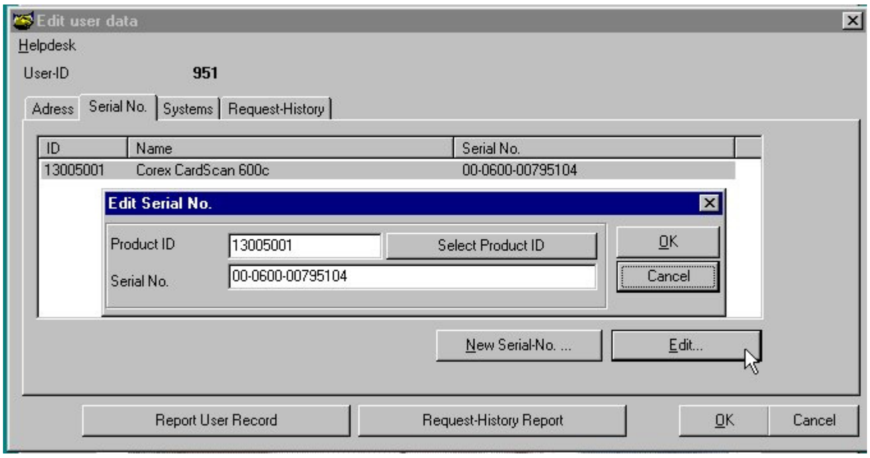


7. On the tab *Serial No.* you find the listing of all serial numbers of the user. When creating a new user the first serial number is automatically added.

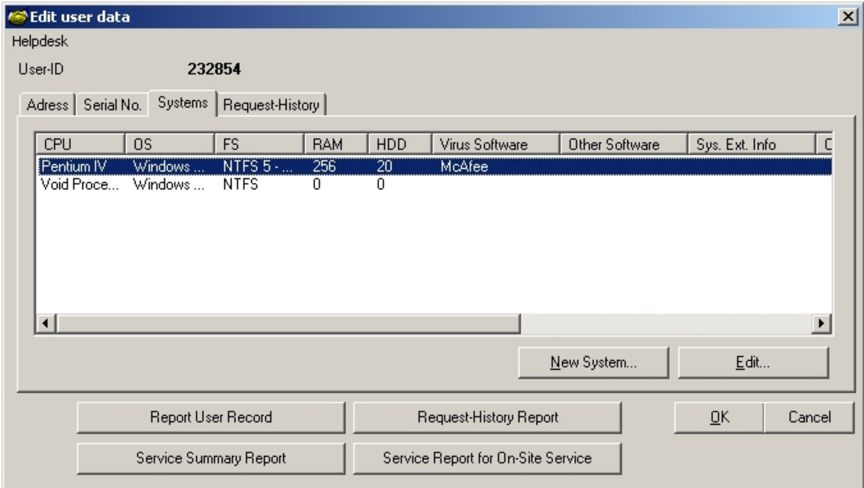


8. Click the button *New Serial-No*…to add a new product with a serial number, and then you receive the shown window on top in which you can select the product from the list and enter the new serial number.

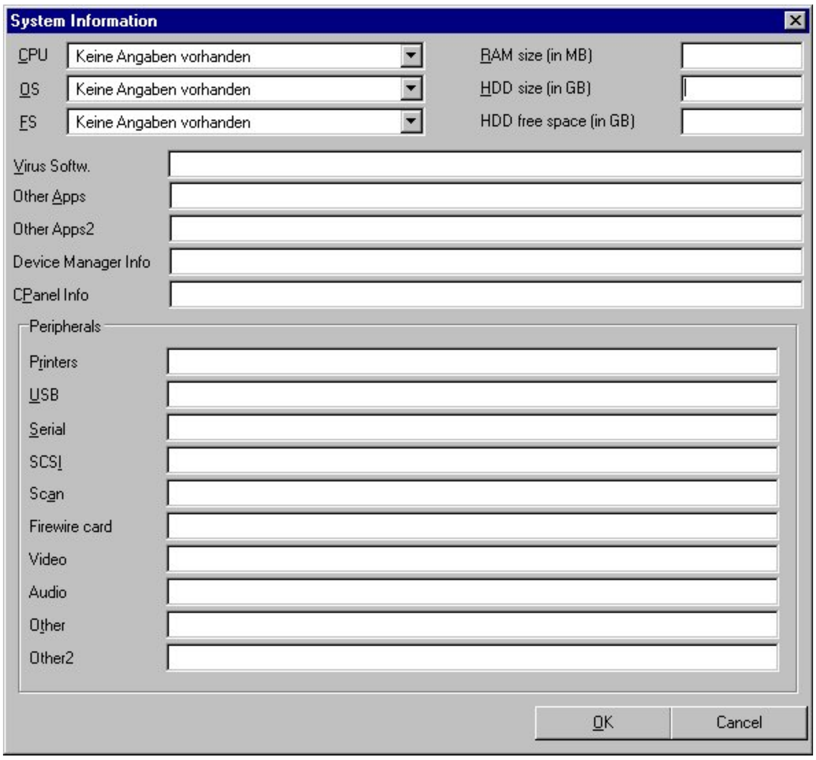
9. You can change any time the serial number of the product if you click the button *Edit*… (like shown below).



10. Under the option *Systems* you find the system data of the user. The following options are available to you: You can edit the listed system configuration when you highlight the record with the mouse and click on the button *Edit* or doubleclick the system record

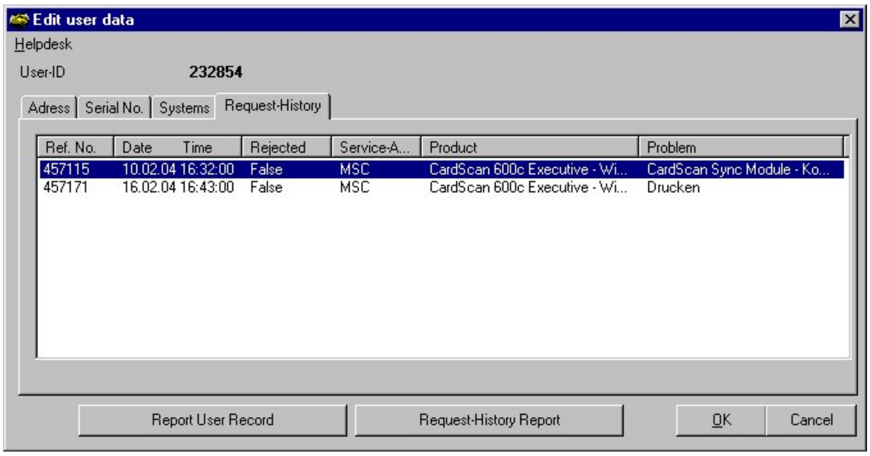


The system configuration screen is shown:

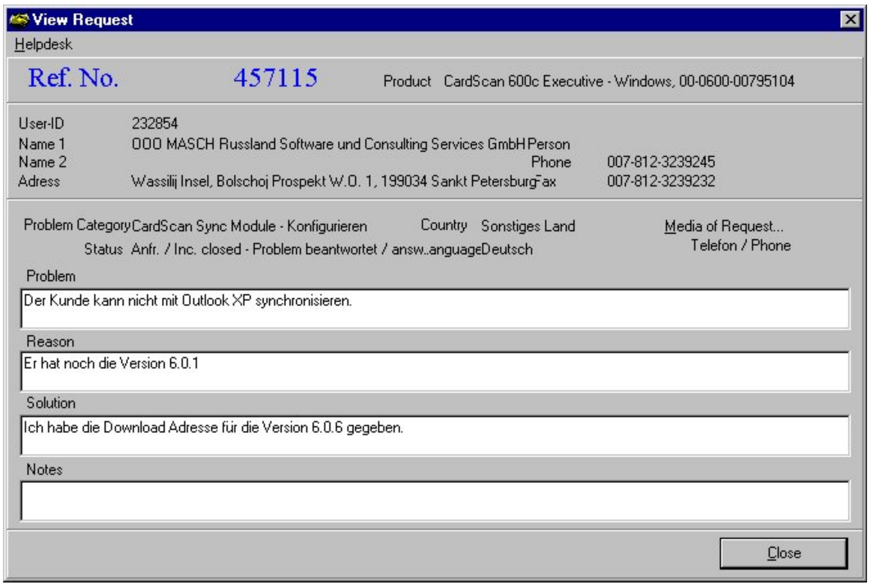


If you want to add a new system configuration, click the button *New System*.

11. Under the tab *Request-History* you find the overview of the entire requests by a user. The tab *Request-History* enables you to check statements which you or your colleagues have given to the user, or to go through them logically again.

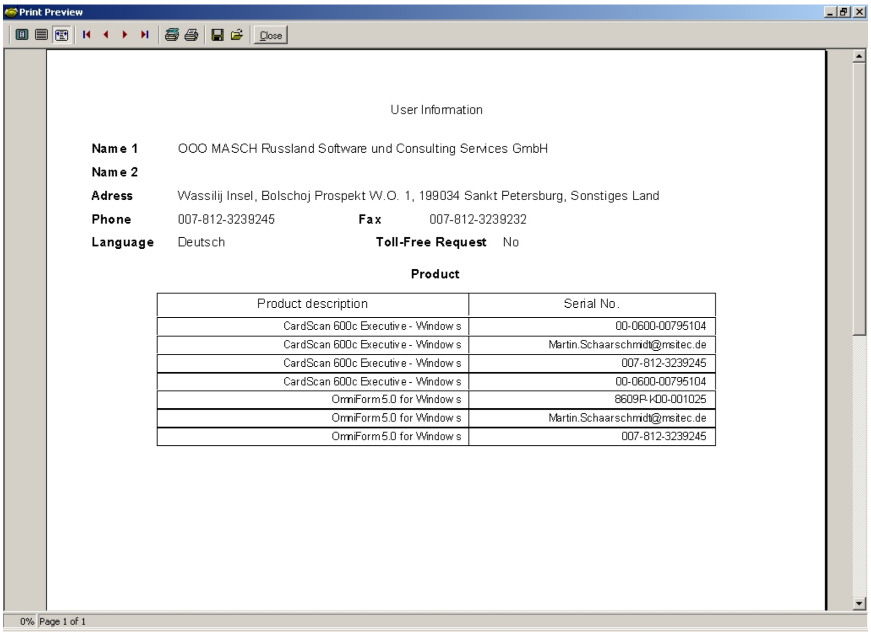


You can open every single request in a second window by double click to view the request. Here, you cannot edit the request, for this use the option *Edit Request*.



12. Important tools to the examination of the user's data are the report of the user record and the Request-History.

13. If you click the button *Report User Record*, you receive the following view which you can print on a connected printer.



14. With a click the button *Request History Report* you receive the following window:

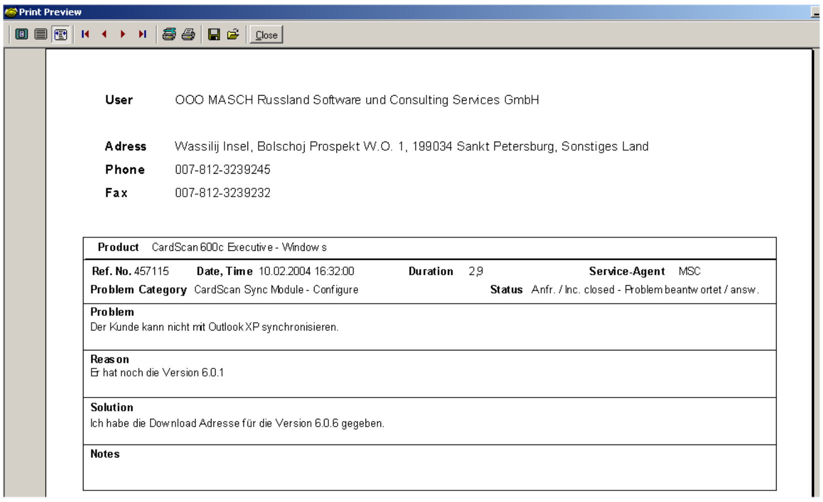
Here you have three report options:

a. select the option *All* to receive the report for all requests

b. with the option *From* you can determine the time period of the report

c. if you activate the option *Ref. No.* and enter the reference number, you can print very simply and fast an overview of the whole correspondence with the user on a printer. Next to the report table all attached fax or email documents will be printed as well.

After you have selected one of the options above, the report on the screen is shown as Preview. If required you can print this preview later.



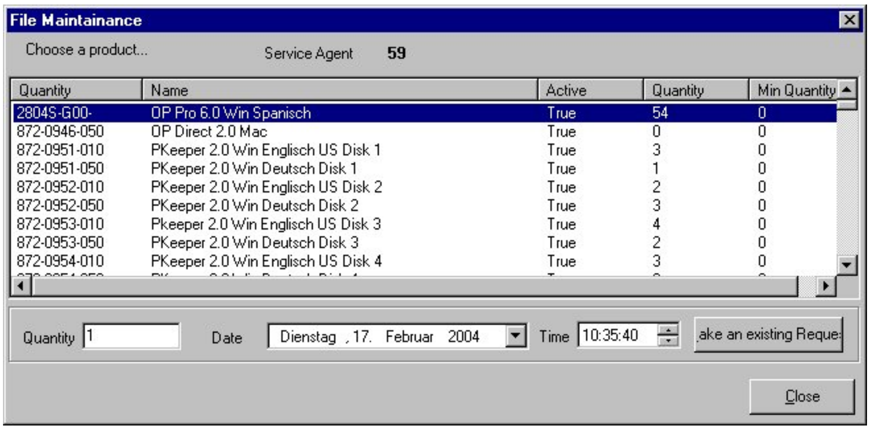
If you, depending in the installed release of Call- & Track, want to use other reports from this menu, you will find the appropriate description within the chapter “Reports” in this manual.

5.4.2 Incoming items

The options *Incoming items* and *Outgoing items* allow the edit of the master data for the spare part management.

To add new articles, you perform the following steps:

1. After selecting the option *Incoming items* in the menu bar *Edit*, the following window is shown:



2. Highlight an article with your mouse and enter under *Quantity* the number of articles to be added.

3. Click the button *Take an existing request* to store the new stock. The articles are automatically added during this process.

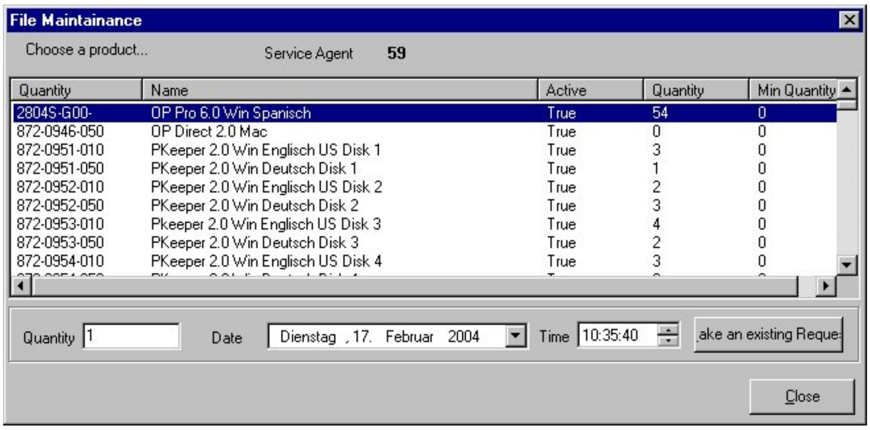
4. In the lower bar the current date and time are shown to you. You can change this by hand, if you select the desired date in the field *Date* and enter the time under *time*.

5. To close the window click *Close*.

5.4.3 Outgoing items

Perform the following steps to take the sold articles out of stock:

1. Select in the menu *Edit* the option *Outgoing items*, the following window is shown:



2. Highlight an article with your mouse and enter under *Quantity* the number of the articles to be taken out of stock.

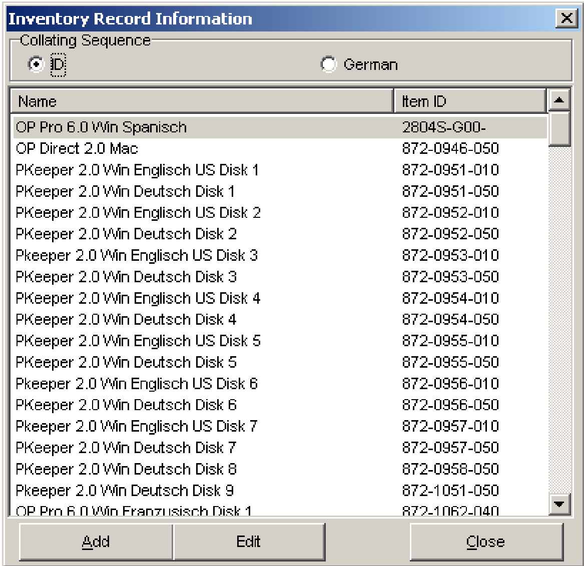
3. Click the button *Take an existing request* to store the new stock. The amount of the article is automatically reduced.

4. In the lower bar the current date and time are shown to you who you can change by hand, if you select the desired date in the field *Date* and enter the time under *Time*.

5. To close the window click *Close*.

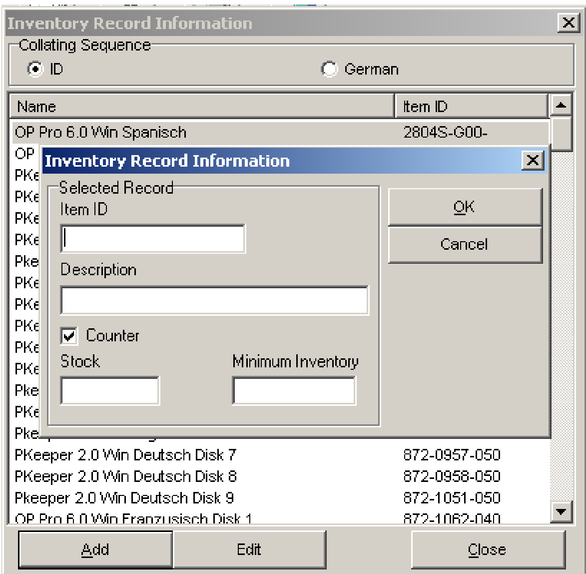
5.4.4 Inventory record information

If you select the option *Inventory Record Information* in the menu *Edit*, the following window is shown to you for the management of the master data:



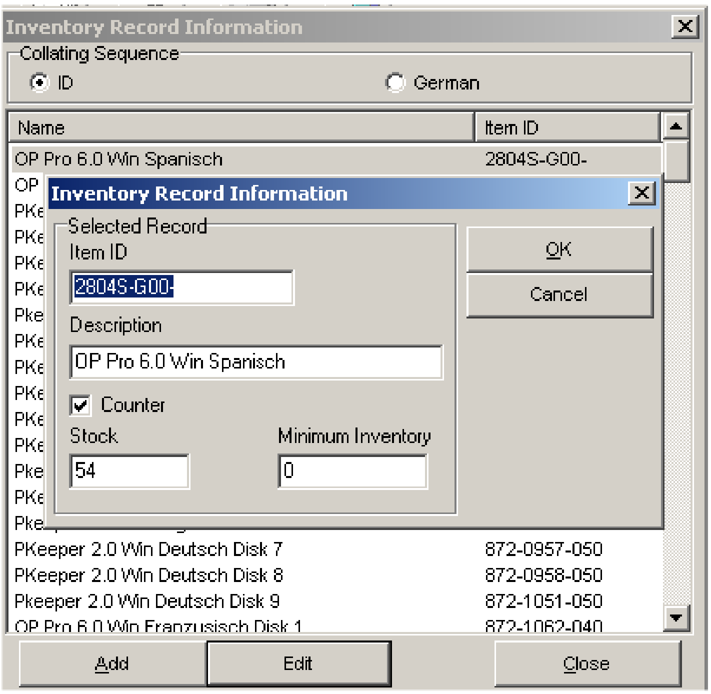
Here yon can choose to sort either by ID or article. Activate the corresponding option with a mouse click.

Click the button *Add* to add new articles. In the shown window you write down the article name and item ID as well as the current stock and Minimum Inventory.



To store the information, click *OK*. The new record is shown in the list of articles.

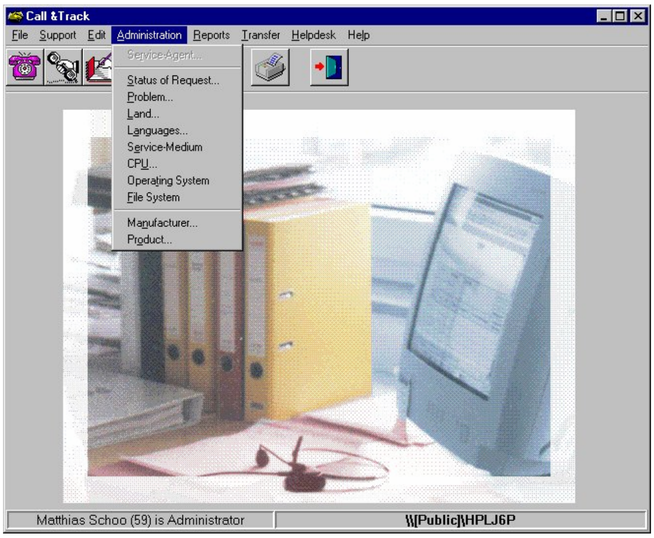
You can edit existing articles any time, by clicking the button *Edit*. You can edit the information in the following window.



To confirm the changes and to close the window, click *OK*.

5.5 Administration

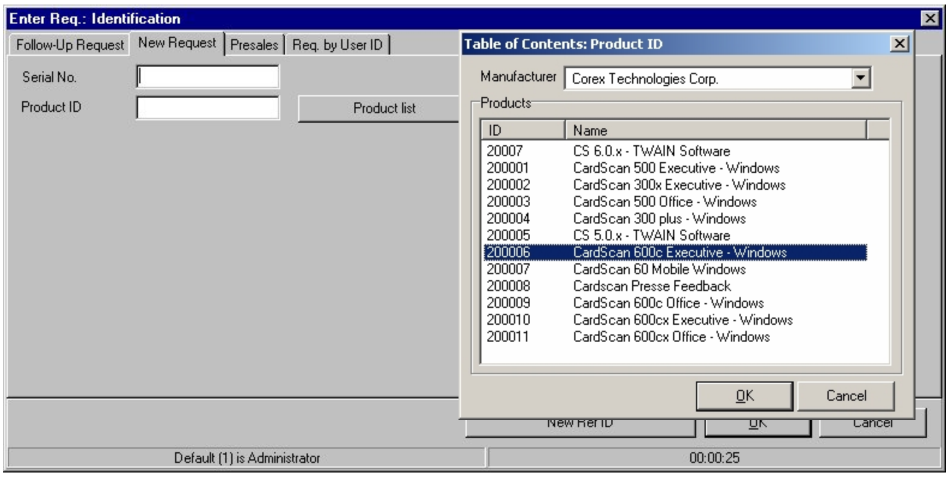
Via the menu Administration you can enter all necessary base data which you will need while working on a request.



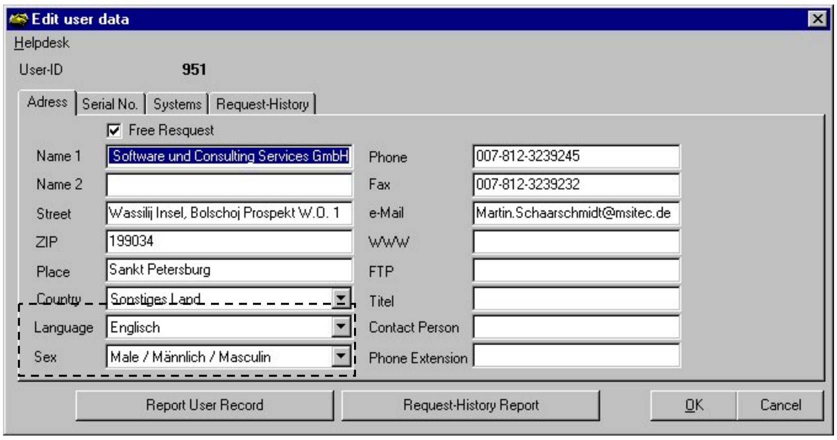
This menu comprises 10 options:

- *Status of Request*
- *Problem*
- *Country*
- *Languages*
- *Service-Medium*
- *CPU*
- *Operating System*
- *File System*
- *Manufacturer*
- *Product.*

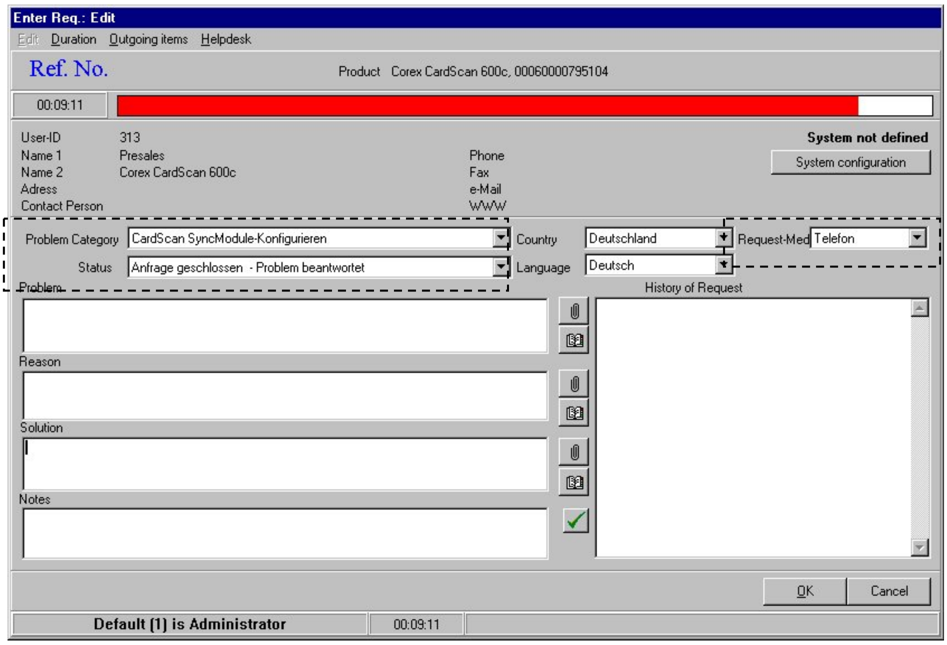
Before entering a request you have to define the options *Manufacturer* and *Product* first:



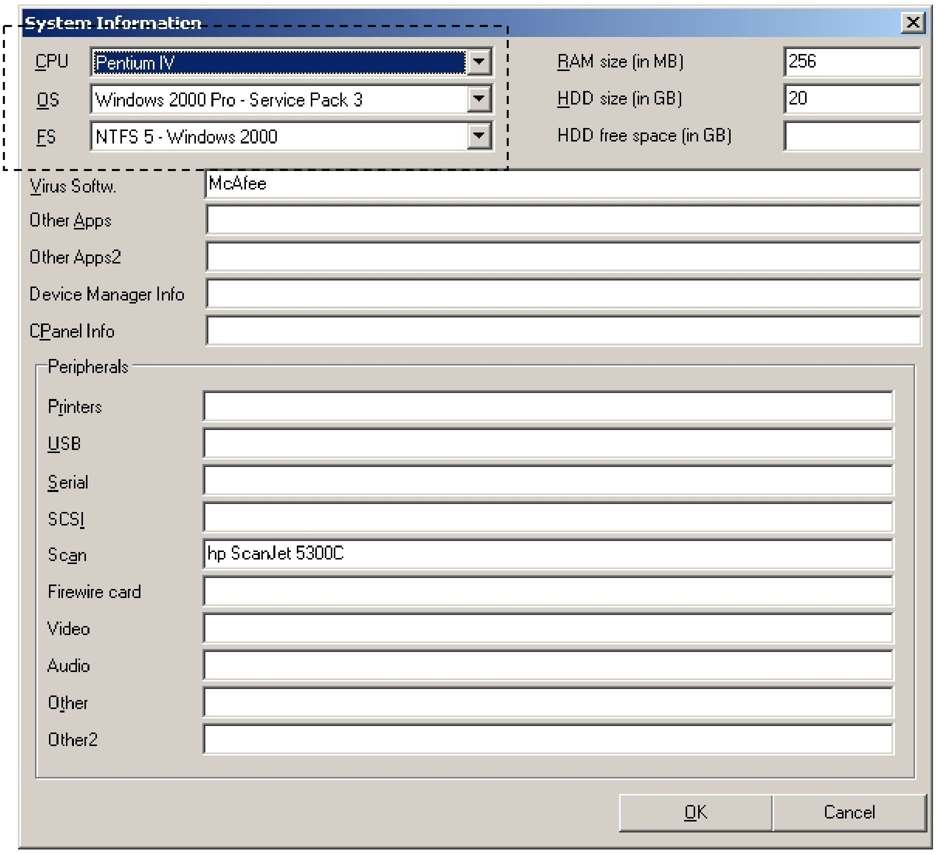
In order to enter the user's data, you need the options *Country* and *Languages*:



The options *Status* and *Problem Category* as well as Request-Med. are used in the window Enter Request Edit:



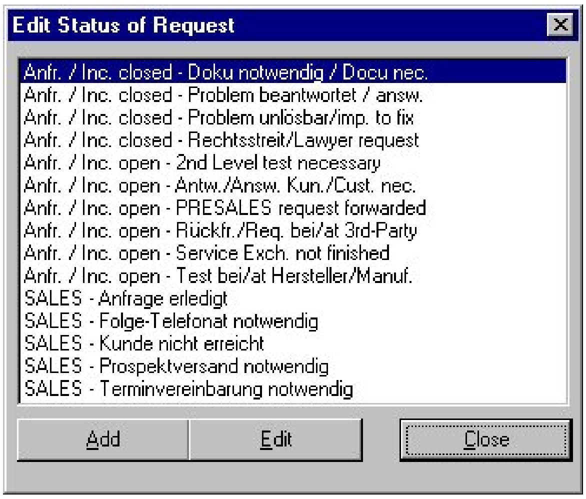
In order to write down the system configuration of the user, you have to define the options *CPU (Processor), OS (Operating System)* and *FS (File system)* first:



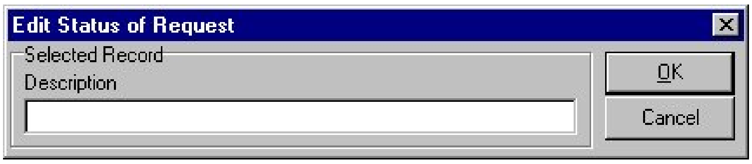
5.5.1 Request status

Enter the different request status as follows:

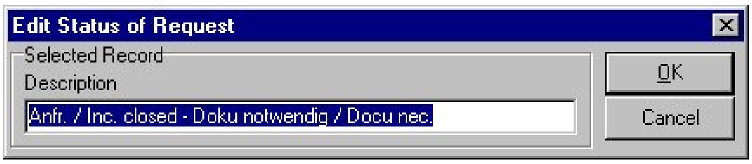
1. Select in the menu *Administration* the option *Status of Request*, the following window comes up:



2. Here all possibilities for the registered request status are listed. You can enter a new request status by clicking on the button *Add* and, as shown in the following window, by typing the new name in the field Description.



3. To change an existing request status, click the button *Edit* and a window is shown where you can edit the data.



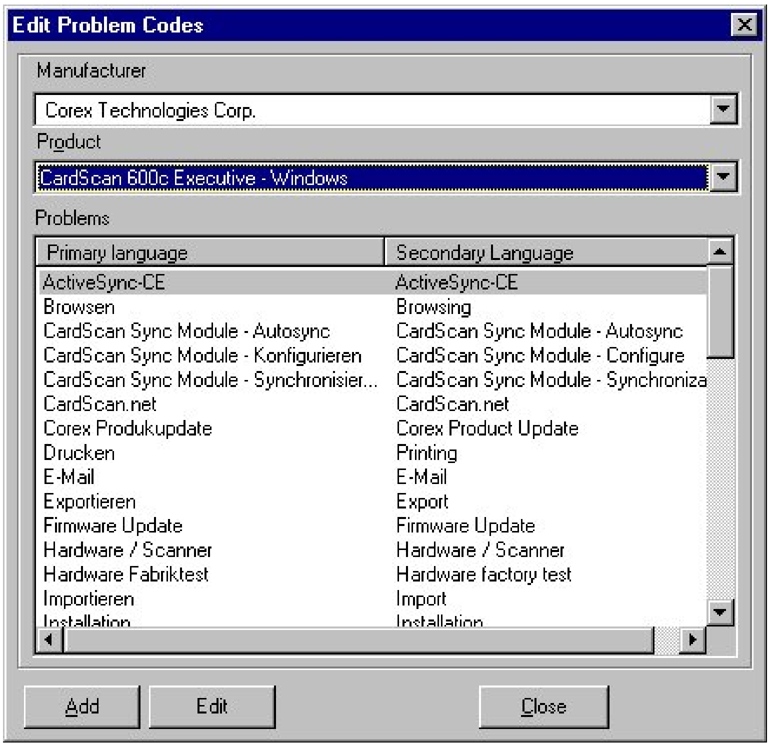
4. Confirm your changes with clicking *OK*.

5.5.2 Problem

Here you can set up the problem groups, please note that you have to enter the problem groups for every manufacturer and for every product individually.

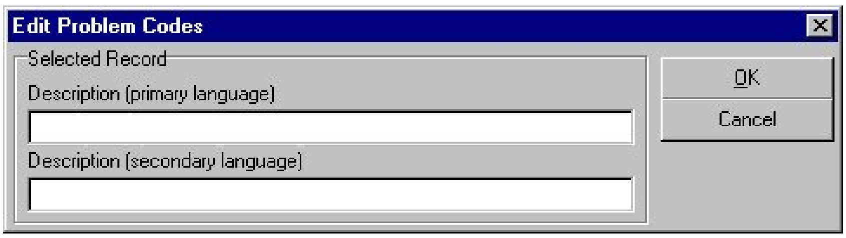
To enter the problem group, perform the following steps:

1. Select in the menu *Administration* the option *Problem*, the following window is shown:

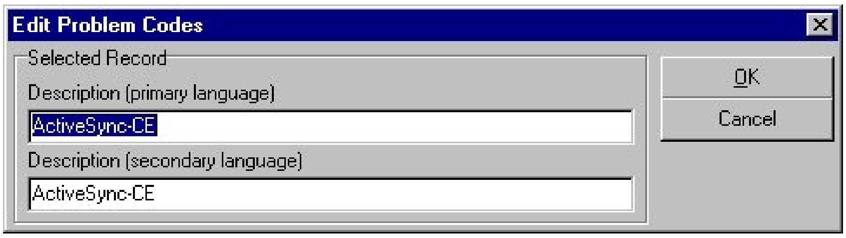


2. Select the manufacturer and the product from the drop down list.

3. In order to enter the name of the problem group (in two languages), click the button *Add*.



4. You can change the existing data by clicking *Edit*.



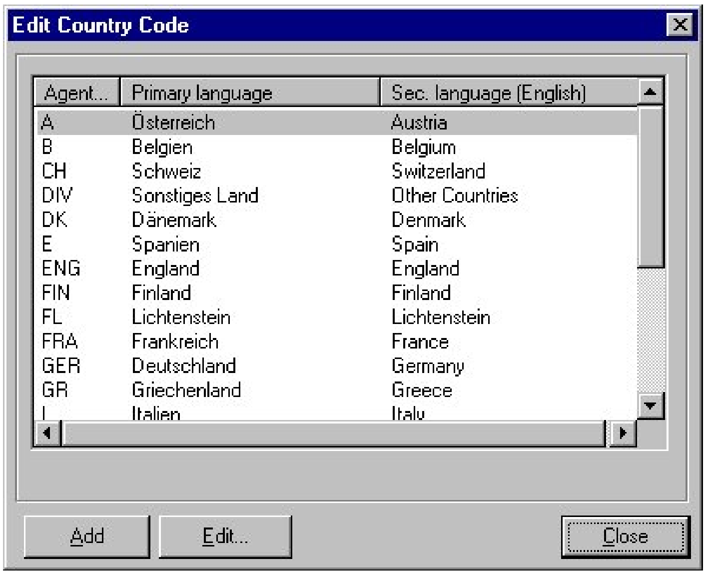
5. To store your information and to close the window, click *OK*.

5.5.3 Country

This option serves for setting up the list of countries.

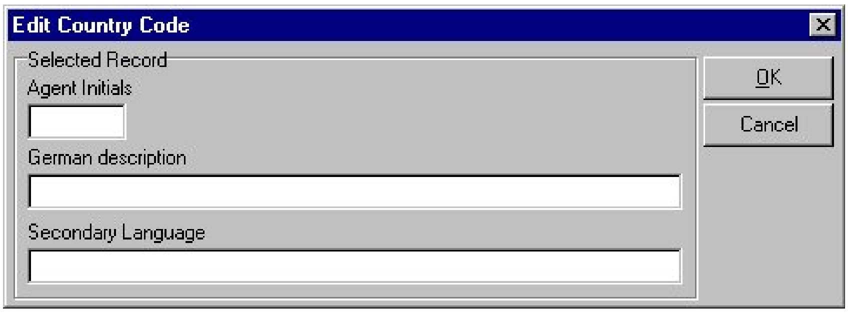
To work on the list of countries, perform the following steps:

1. Select in the menu *Administration* the option *Country*, the following window is shown:

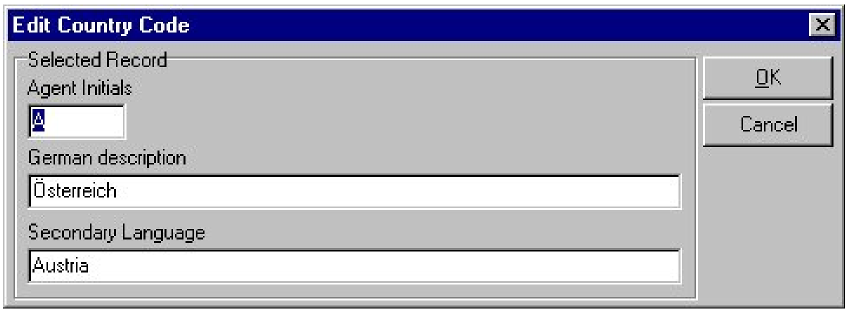


2. To extend the list of countries, click on *Add*.

3. Enter your Agent Initials, the names of the country in German and English and click *OK,* to store the data.



4. If you click the button *Edit*, you can change the existing information.



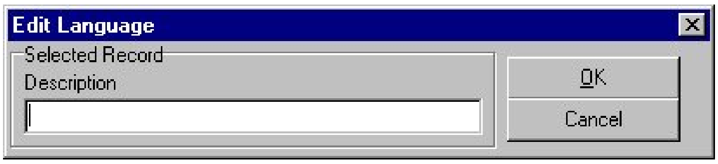
5. Confirm your changes with a click on *OK*.

5.5.5 Languages

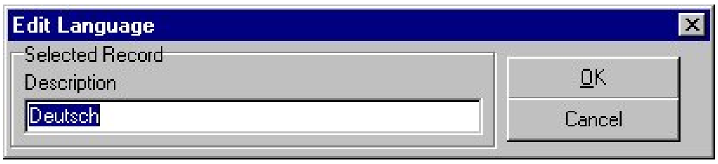
Here you can add or edit the languages.

1. Select in the menu *Administration* the option *Languages* to open the window *Edit language*:

2. Click on *Add* to extend the list of languages.



3. If you want to change the name of a language, click on *Edit*.



4. To store your changes, click *OK*. The changes are shown in the list of languages.

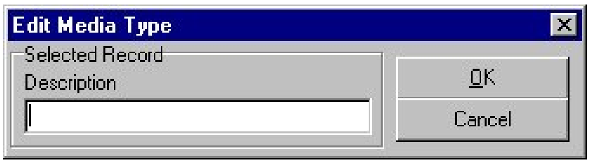
5.5.5 Service medium

Requests of the users are coming in using different service media.

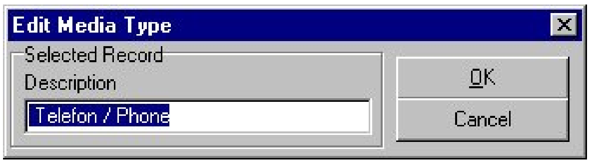
To enter the list of service medium, perform the following steps:

1. Select in the menu *Administration* the option *Service-Medium* to open the window *Edit Request-Medium*:

2. To extend the list of the service media, click the button *Add*.
3. In the window below you enter the media type; click *OK,* to store the data.



4. Click *Edit* to change the media type.



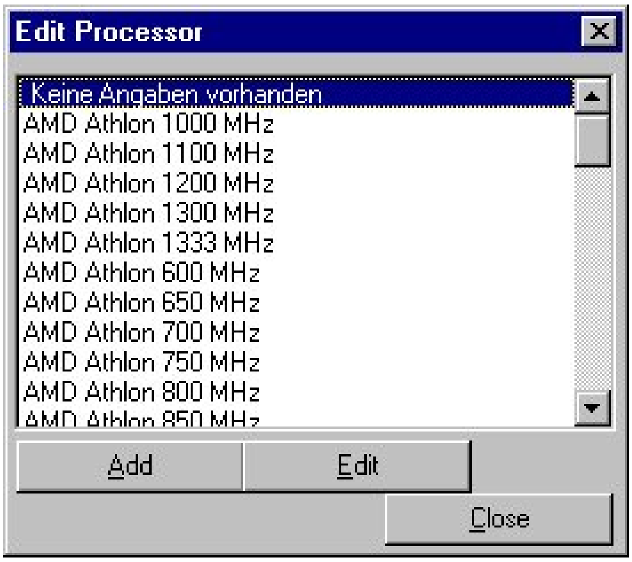
5. Confirm your changes with *OK*.

5.5.6 Processors

In order to write down the system configuration of the user, you have to define the options of the list of the processors first.

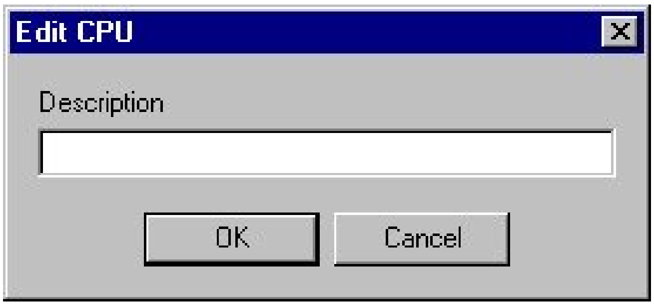
To enter the list of the processors, perform the following steps:

1. Select in the menu *Administration* the option *CPU* to open the window *Edit Processor*:



2. To add a new processor, click the button *Add*.

3. In the shown window you enter the processor type, and then click *OK,* to store the data.



4. If you click the button *Edit*, you can work on the type of processor.

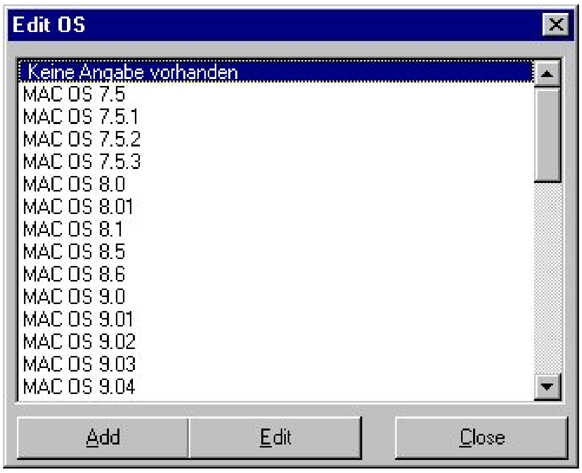
5. Confirm your changes with OK.

5.5.7 Operating system

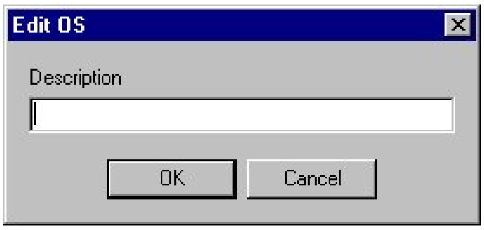
This option serves for entering the list of operating systems.

How to enter different operating systems:

1. Select in the menu *Administration* the option *Operating system,* the following window is shown:



2. All registered operating systems are listed. You can enter a new operating system by clicking the button *Add* and entering the new name.



3. Click on *Edit* to change available data.

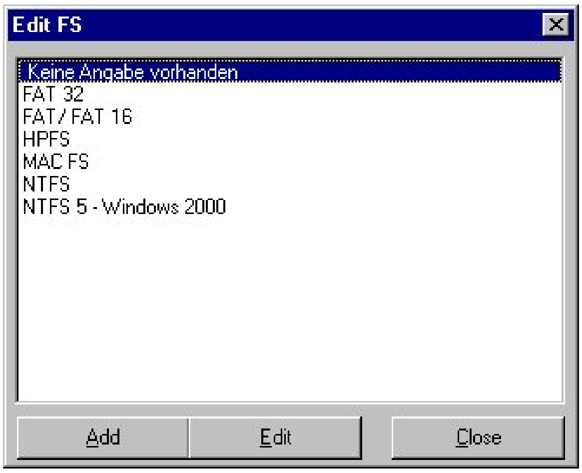
4. Confirm your changes with OK.

5.5.8 File system

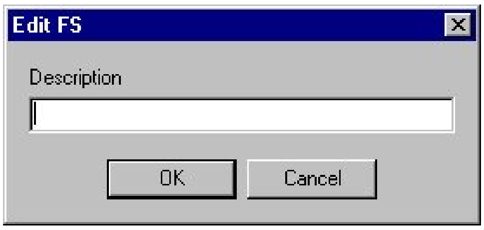
Here you can add file systems or change them.

To enter the list of the file systems, perform the following steps:

1. Select in the menu *Administration* the option *File system* to open the window *Edit FS*:



2. Click the button *Add* to extend the list of the file systems.



3. If you have to change the name of the file system, click *on Edit*.

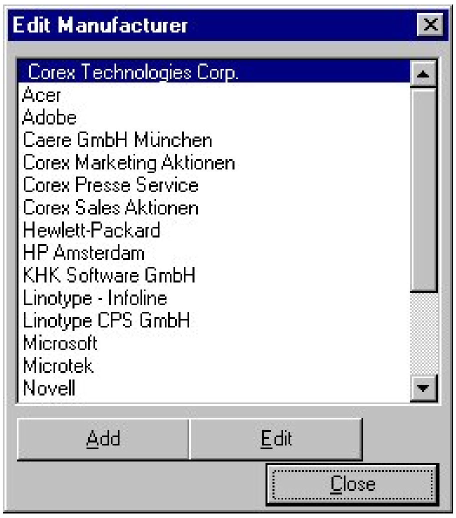
4. You store your changes with a click on *OK*. The list of the file systems is updated.

5.5.9 Manufacturer

Here you can set up the list of the manufacturers.

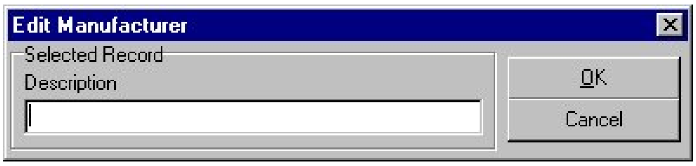
The following steps are necessary to add a new manufacturer or to change the list of the registered manufacturers:

1. Select in the menu *Administration* the option *Manufacturer*, the following window is shown:

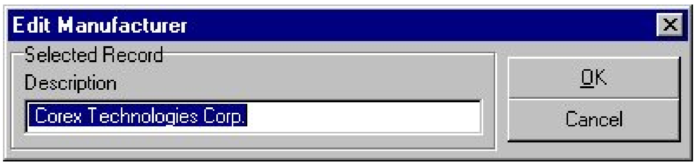


2. To extend the manufacturer's list, click the button *Add*.

3. Enter the name of the manufacturer and click *OK* to store the data.



4. If you click the button *Edit*, you can work on the existing names.



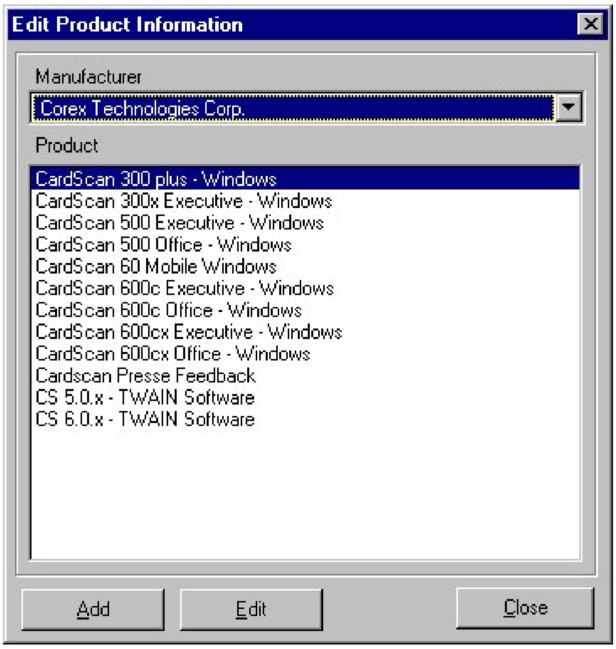
5. Confirm your changes with OK.

5.5.10 Product

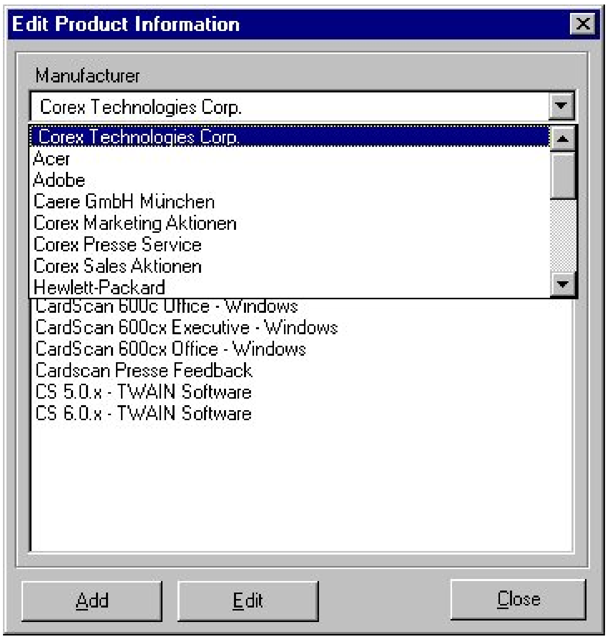
Here you can set up the product list which you will need when working on the requests.

To set up the product list, perform the following steps:

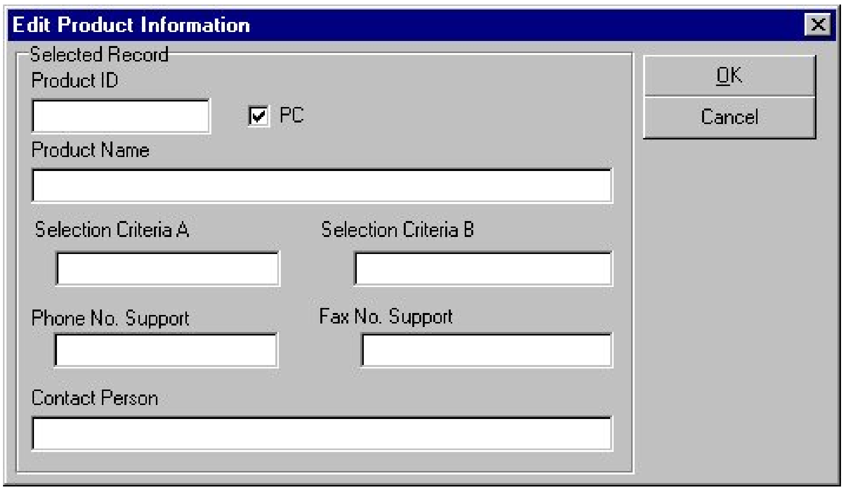
1. Select in the menu *Administration* the option *Product;* the window Edit Product Information is shown:



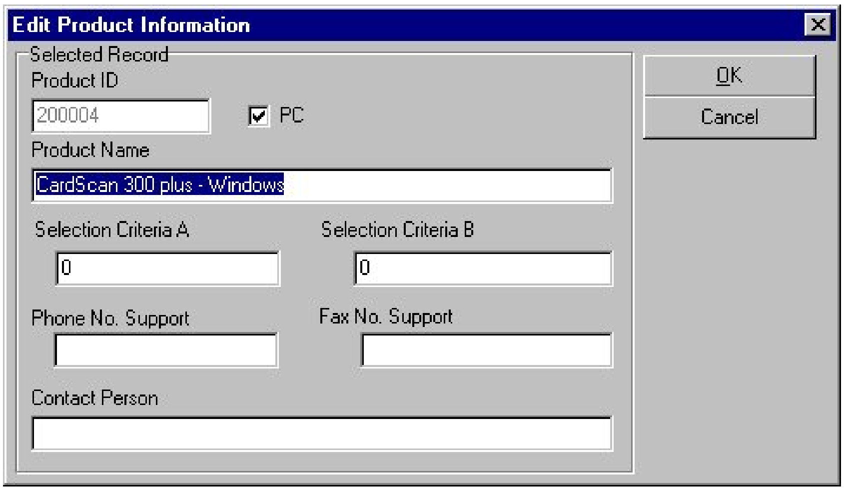
2. Select the manufacturer from the drop down list.



3. Click the button *Add* and a window is shown where you can enter the product information.



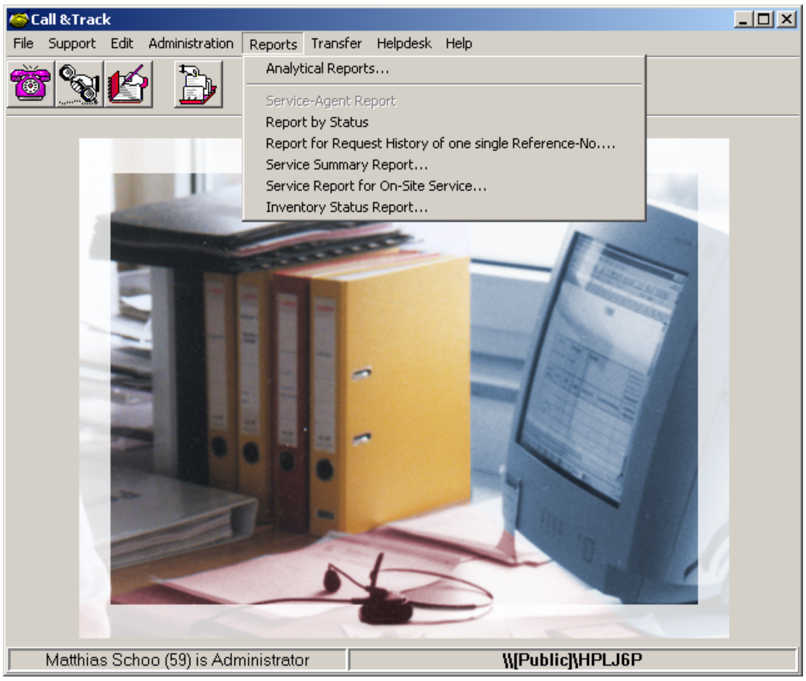
4. To change an existing product, click the button *Edit*. In the window shown you can change the data.



5. Click *OK* to store your information and to close the window.

5.6 Reports

The menu bar of Reports encloses a huge number of options which allow you to create current and necessary evaluations from the request or service amount.



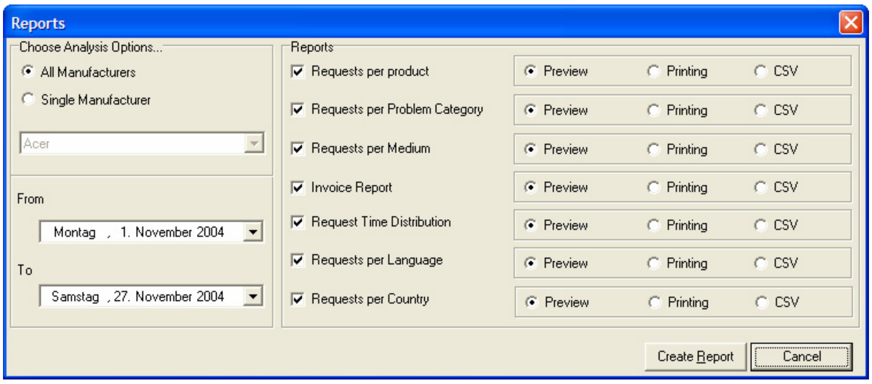
The following options are available:

- Report evaluation as a preview / printout / export file;
  - Requests per product
  - Requests per problem category
  - Requests per medium
  - Invoice report
  - Requests time distribution
  - Requests per language
  - Requests per country
- Report according to the request status
- Single report for a reference number
- Accumulated service report
- Service report for On-Site
- service report of the stock management

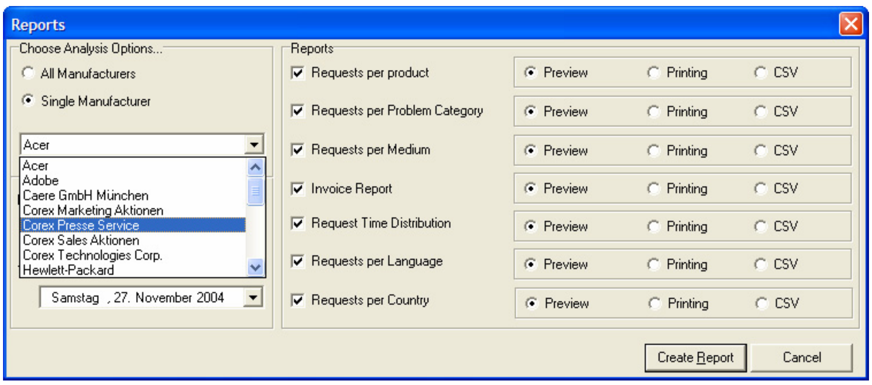
5.6.1 Analysis Report

You can combine different evaluation report as follows:

1. Choose in the menu bar *Reports* the option *of Evaluation Report*, the following choice window is shown to you:



2. If you want to create the report "Products of all manufacturers", activate the option *All Manufacturers*. You can also provide a report according to a single manufacturer, while you activate the option *of Single Manufacturers* and select the manufacturer from the drop down list.

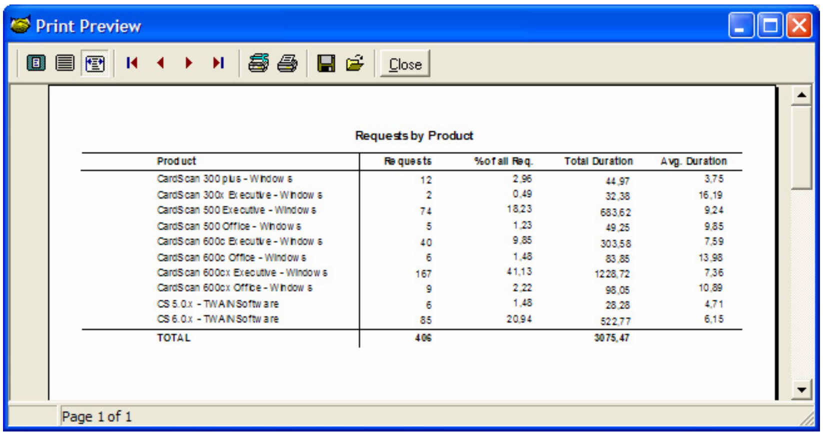


3. To evaluate requests of a "fixed defined period ", enter under *From* and *To* the desired period.

4. Different types of request reports are at your disposal: *requests per product, requests per problem category, requests per medium, invoice report, request time distribution as well as requests per language and requests per country.*

5. You can create reports in three different variants: *as a preview*, *printout* or *CSV file*.

- If you activate the option *Preview* and click the button *Create Report,* the following window with the preview of the report *Support Requests By Product* appears:



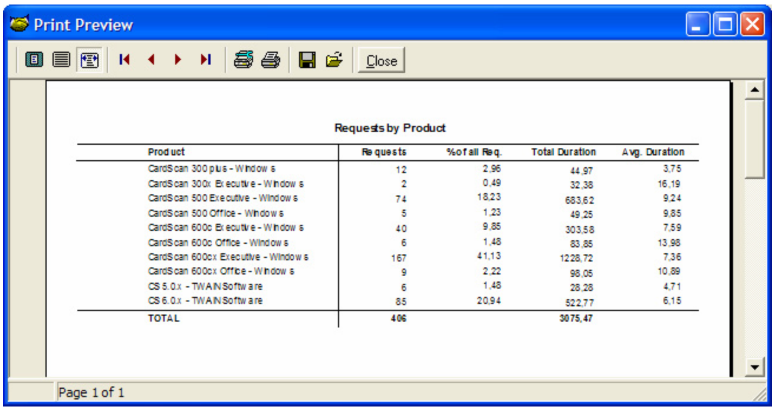
Product	Requests	% of all Req.	Total Duration	Avg. Duration
CardScan 300 plus - Windows	12	2,96	44,97	3,75
CardScan 300x Executive - Windows	2	0,49	32,38	16,19
CardScan 500 Executive - Windows	74	18,23	683,62	9,24
CardScan 500 Office - Windows	5	1,23	49,25	9,85
CardScan 600c Executive - Windows	40	9,85	303,58	7,59
CardScan 600c Office - Windows	6	1,48	83,85	13,98
CardScan 600cx Executive - Windows	167	41,13	1228,72	7,36
CardScan 600cx Office - Windows	9	2,22	98,05	10,89
CS 5.0.x - TWAIN Software	6	1,48	28,28	4,71
CS 6.0.x - TWAIN Software	85	20,94	522,77	6,15
TOTAL	406		3075,47	

- You have the possibility to print out the report on a connected printer, while you click *the printer symbol* or you can store the report with a click on the *Save symbol*. Click *Close* to close the report.

- If the option *View* is activated for every report type, they are created automatically and opened one after another. In order to close this report and to open the report review click on the button *Close*.

- The following reports are at your disposal:

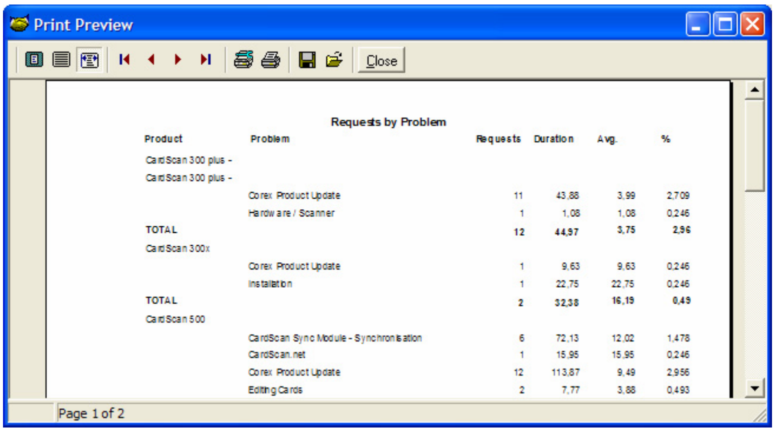
a. *Requests per product*



Requests by Product

Product	Requests	%of all Req.	Total Duration	Avg. Duration
CardScan 300 plus - Windows	12	2,96	44,97	3,75
CardScan 300x Executive - Windows	2	0,49	32,38	16,19
CardScan 500 Executive - Windows	74	18,23	683,62	9,24
CardScan 500 Office - Windows	5	1,23	49,25	9,85
CardScan 600c Executive - Windows	40	9,85	303,58	7,59
CardScan 600c Office - Windows	6	1,48	83,85	13,98
CardScan 600cx Executive - Windows	167	41,13	1228,72	7,36
CardScan 600cx Office - Windows	9	2,22	98,05	10,89
CS 5.0.x - TWAIN Software	6	1,48	28,28	4,71
CS 6.0.x - TWAIN Software	85	20,94	522,77	6,15
TOTAL	406		3075,47	

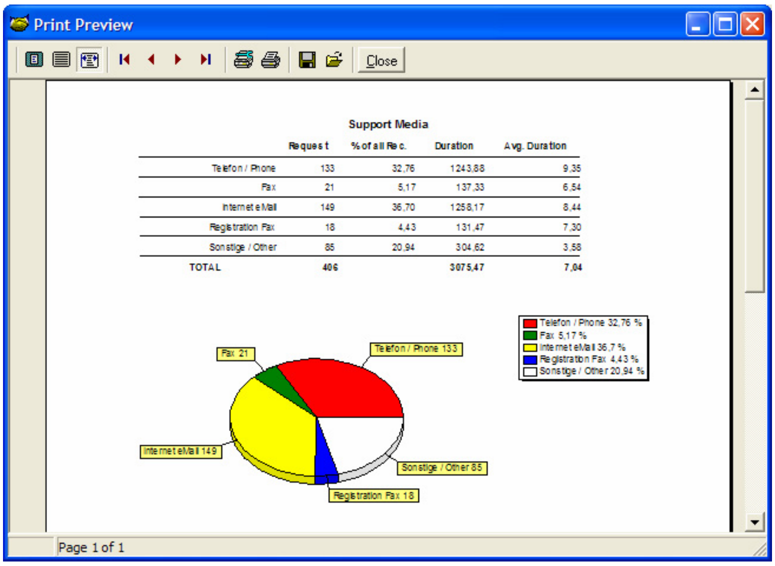
b. *Requests per problem category*



Requests by Problem

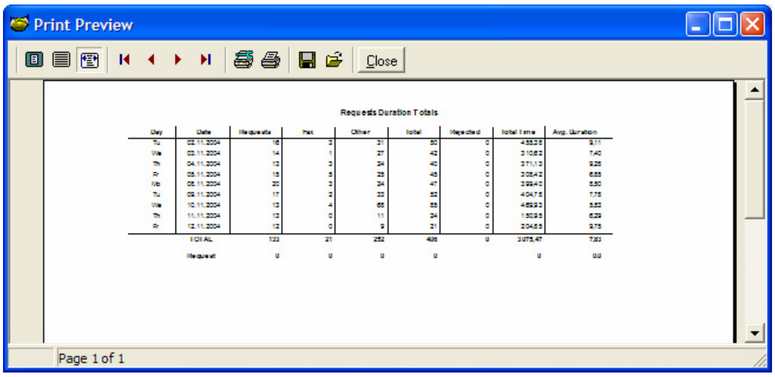
Product	Problem	Requests	Duration	Avg.	%
CardScan 300 plus -					
CardScan 300 plus -					
	Corex Product Update	11	43,88	3,99	2,709
	Hardware / Scanner	1	1,08	1,08	0,246
TOTAL		12	44,97	3,75	2,96
CardScan 300x					
	Corex Product Update	1	9,63	9,63	0,246
	Installation	1	22,75	22,75	0,246
TOTAL		2	32,38	16,19	0,49
CardScan 500					
	CardScan Sync Module - Synchronisation	6	72,13	12,02	1,478
	CardScan.net	1	15,95	15,95	0,246
	Corex Product Update	12	113,87	9,49	2,956
	Editing Cards	2	7,77	3,88	0,493

c. *Requests per medium*

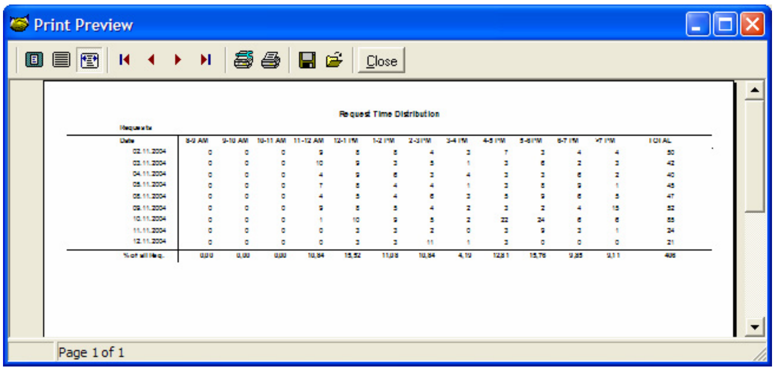


	Request	% of all Rec.	Duration	Avg. Duration
Telefon / Phone	133	32,76	1243,88	9,35
Fax	21	5,17	137,33	6,54
Internet eMail	149	36,70	1258,17	8,44
Registration Fax	18	4,43	131,47	7,30
Sonstige / Other	85	20,94	304,62	3,58
TOTAL	406		3075,47	7,04

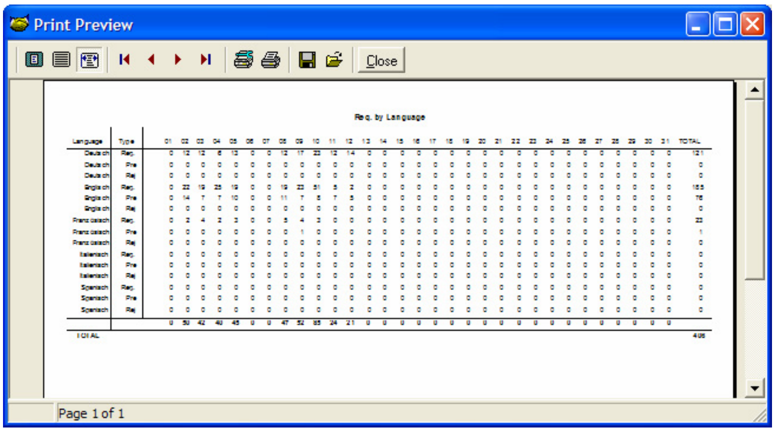
d. *Invoice Report*



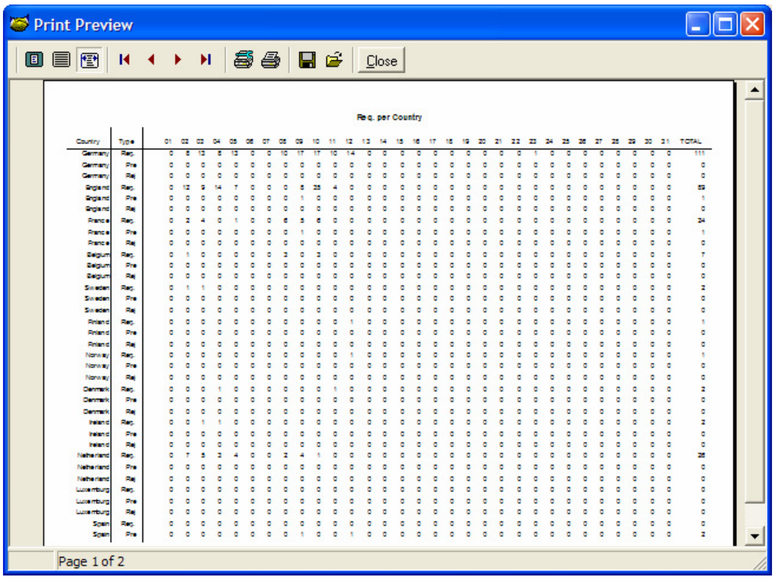
e. *Requests time distribution*



f. *Requests per language*



g. *Requests per country*



6. If you want to receive a printout of the report without preview, activate the option *Printout* and click the button *Create Report*, now the documents are printed on the connected printer.

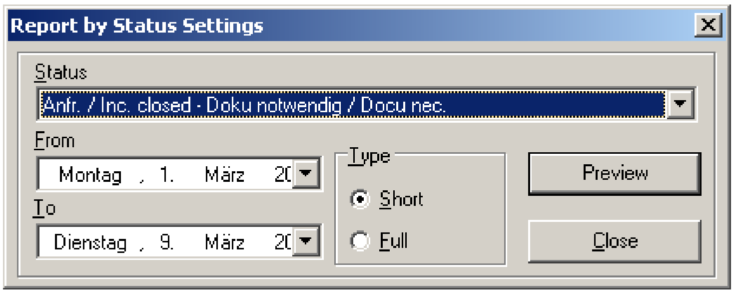
7. To receive the report in form of an export file, activate the option *CSV* and click the button *Create Report*. A CSV file is generated which is stored in the folder Call & Track under report.

5.6.2 Report according to request status

This option allows the report to provide according to request status.

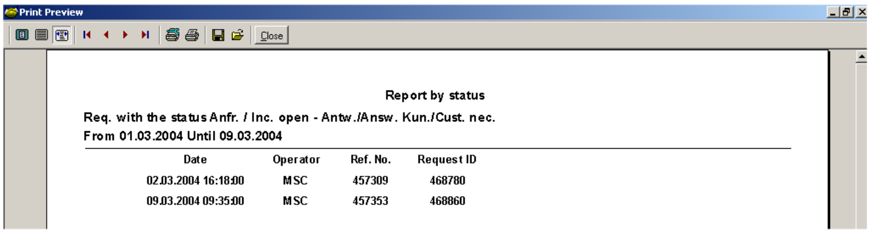
You create the report according to a certain request status:

1. Choose in the menu bar of *report* the option *Report after request status*, the following window appears:



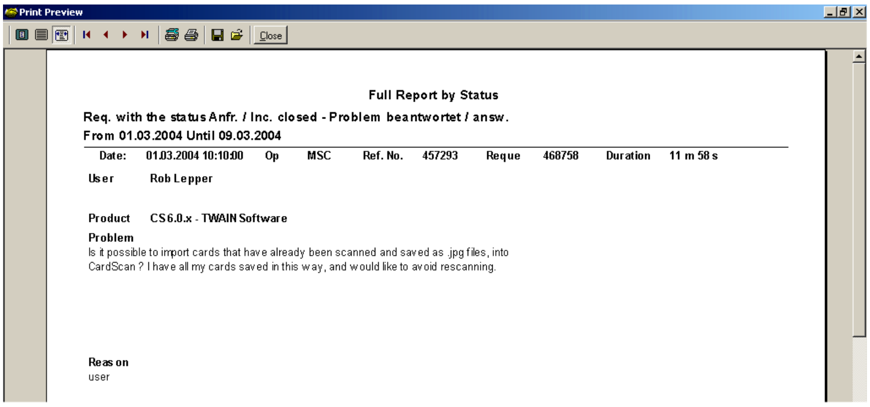
2. Select the request status from the drop down list and determine the period of the report.

3. You can create a short report, while you activate the option *Short* and click *on preview.* You receive the following window:



You can print the indicated report either on the connected printer, or store it as a report file. Click in conclusion on *Close* to close the window.

4. Activate the option *Entire* to create a detailed report. With a click on *Preview*, you receive the following report preview:

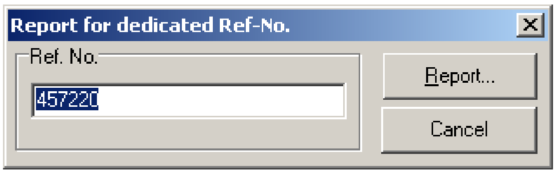


5.6.3 Single report for a reference number

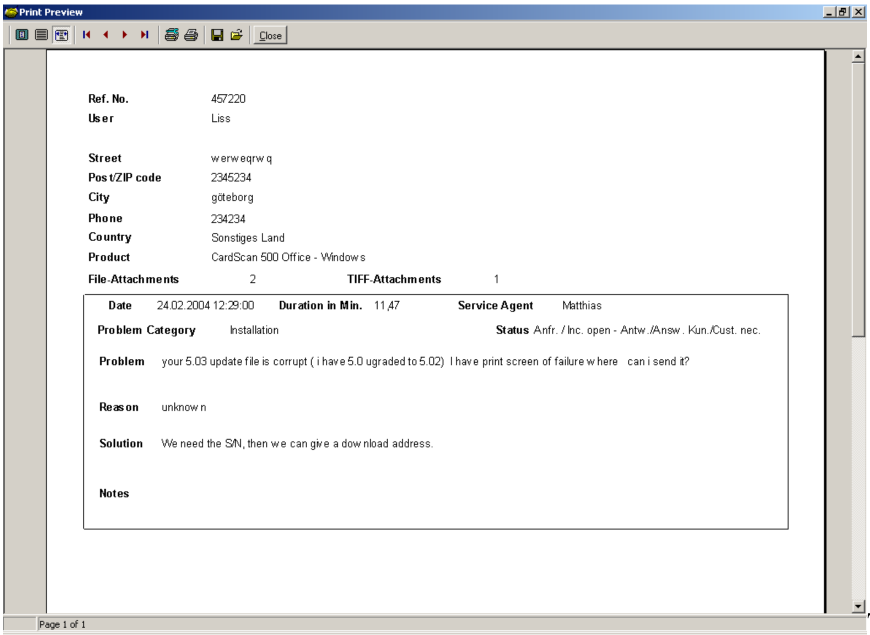
The next report option which is available to you is a report for every reference number.

You can create the report for every reference number, as follows:

1. Choose in the menu bar *Reports* the option *Single Report for dedicated reference number* the following window appears:



2. Enter the reference number and click the button *Report* to open the report preview.



This report contains the detailed request history according to the reference number you entered.

3. You can print the created report on a connected printer or store it as a report file.

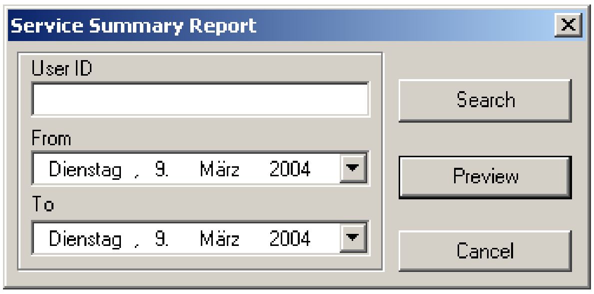
4. At the end click on *Close* to close the window.

5.6.4 Accumulated service report

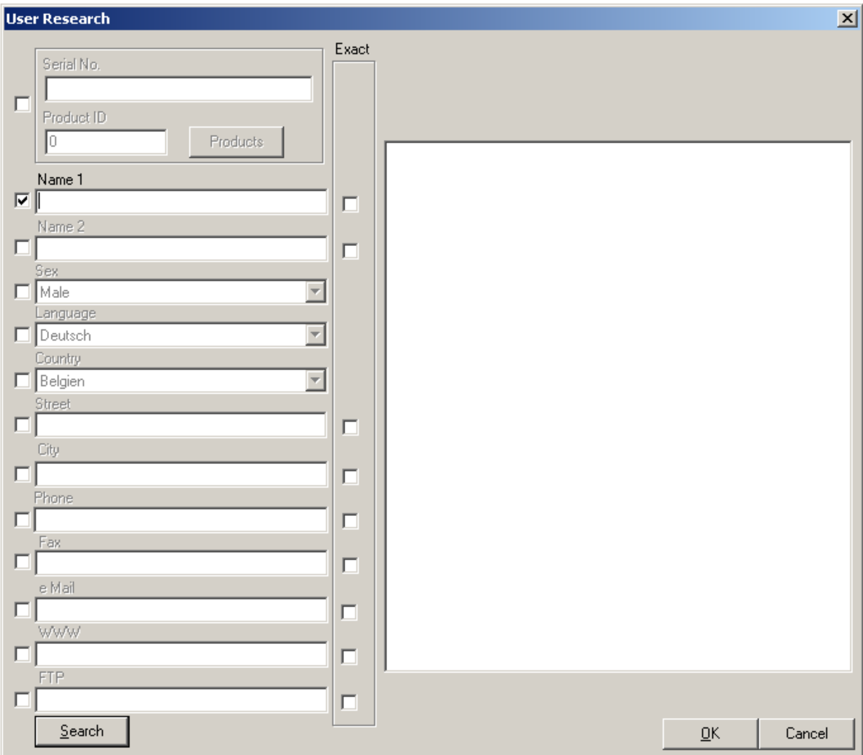
The accumulated service report serves the service engineer and the administrator IT as a basis for the account of his service.

The accumulated service report is created as follows:

1. Choose in the menu bar of *Reports* the option *Accumulated Services Report* the following window appears:



2. Enter the users ID (customer number) in the text field or click the button *Browse*. The search user window below is opened, in which you can look for the user:

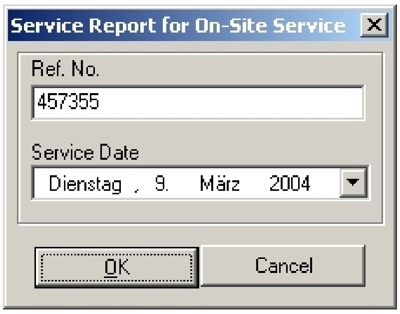


3. Determine the period of time for the account and click on *preview* to produce the report.
4. Now Call- & Track determines all requests of the defined period, and accumulates the used working hours.

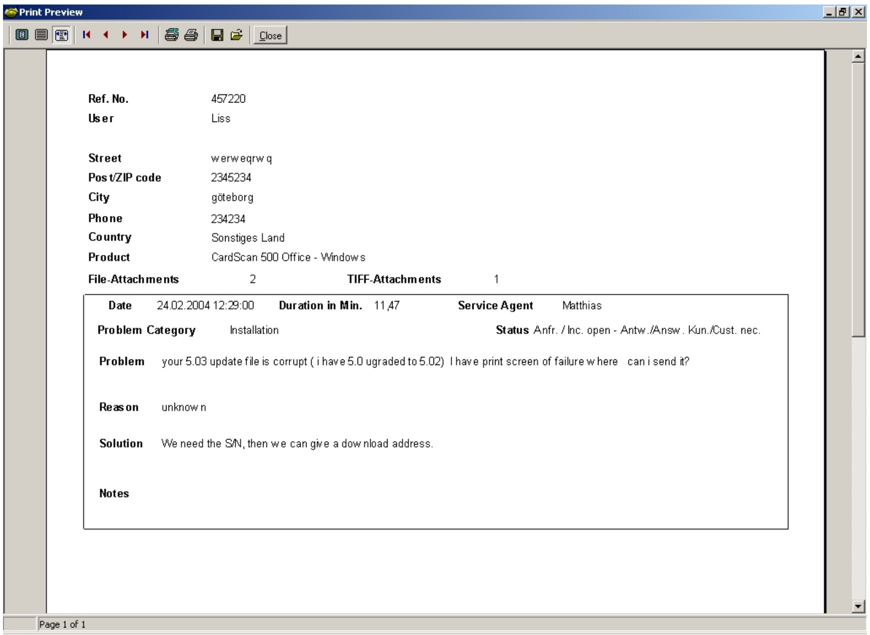
5.6.5 Service report for On-Site service

You create the service report for On-Site services as follows:

1. Choose in the menu bar *Reports* the option *Service Report for On-Site service* the following window appears:



2. Enter the reference number in the text field, select the date and click *OK,* to open the report preview.



You receive a detailed report for this reference number and the selected day incl. all information about attached documents.

3. Using the upper menu bar you can print the report alternatively on a connected printer or store it as a report file.

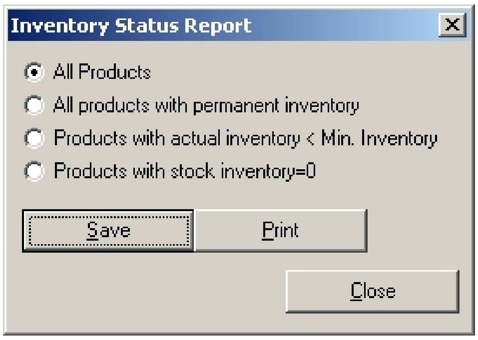
4. Click on *Close* to close the window.

5.6.6 Report of the stock management

The option *Stock Management* allows you to receive an overview of the inventory.

The following steps are necessary for the creation of a report for the stock management:

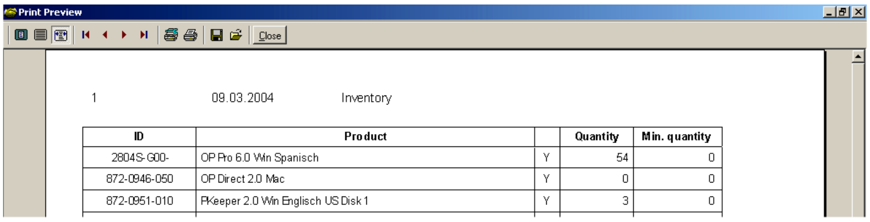
1. Choose in the menu bar *Reports* the option *Service stock management* the following choice window appears:



2. Now four report options are available to you. Activate an option and click on *Save* to save the report. The following window for file selection appears:

Enter a file name and click on *Save*.

3. If you want to print out the report, click on the button *Print*. Now you receive the following report preview with the inventory:



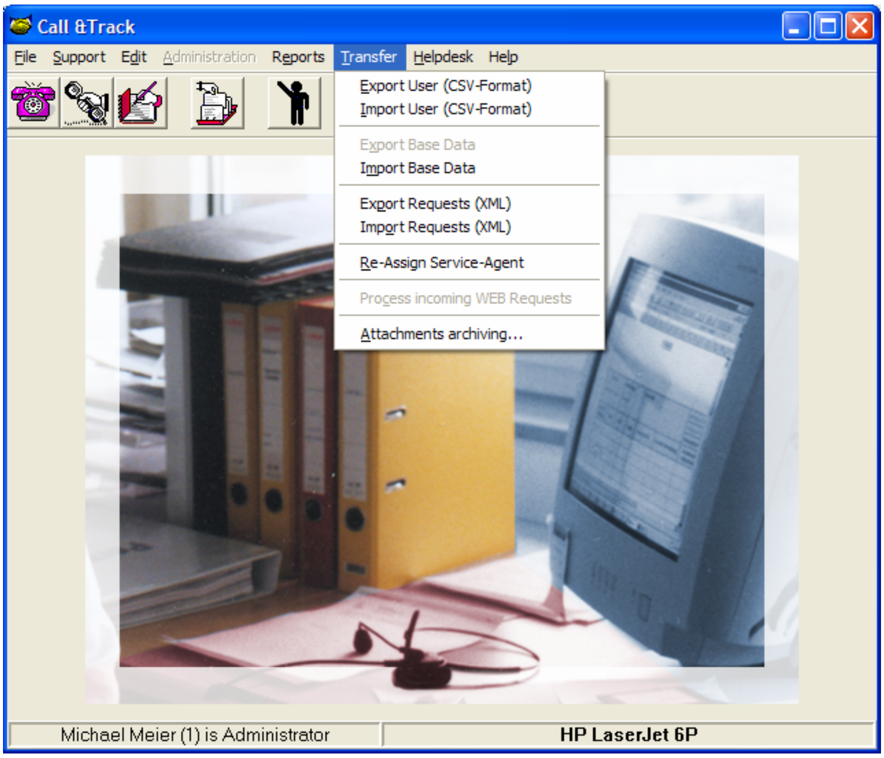
4. Using the upper menu bar you can print the report alternatively on a connected printer or store it as a report file.

5. At the end click on *Close* to close the window.

5.7 Transfer

The transfer function contains following options:

- Export and import of User data
- Export and import of Base data
- Export and import of request data (XML format)
- To assign a different Service-Agent to a call
- Process incoming WEB Requests
- Attachments archiving



Important Note!

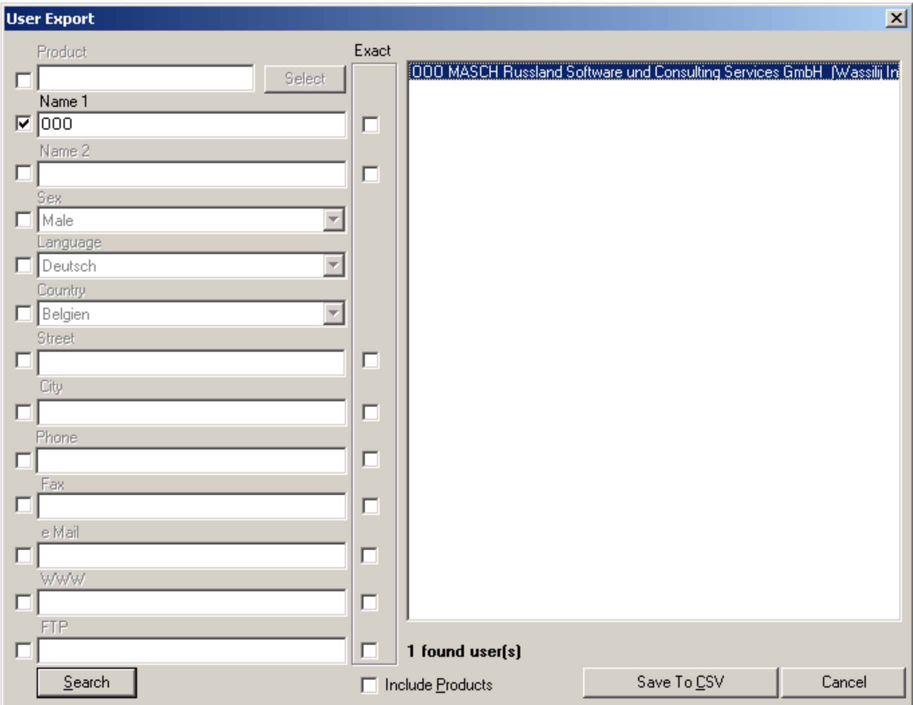
Please be informed, that you cannot use this function for generating a data backup of your Call- & Track database. For backing up your Call- & Track database, you should backup your MSDE- or your installed SQL 2000 Server.

5.7.1 Export of User data

With this option you can export the user data from Call & Track. A CSV file is created, which you can import into Microsoft Excel or other standard data bases.

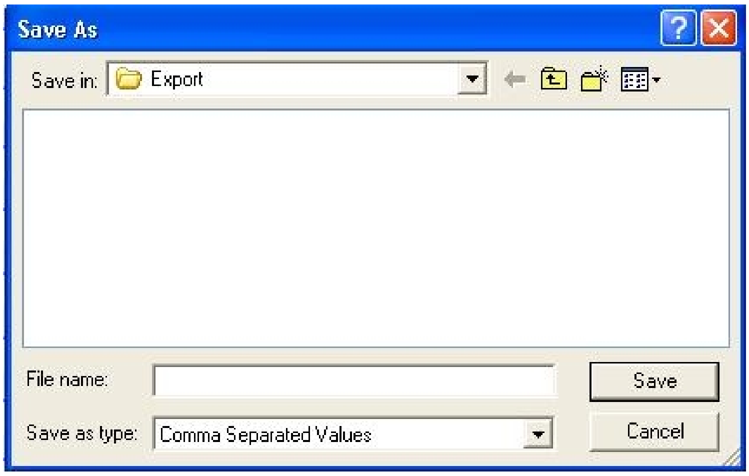
How to export your user's data:

- Select in the menu *Transfer* the option *Export user;* The already known search user window is shown:



- Search now either specific for a user or a group of users under aid of the searching criteria.

- If you wish an entire export of all users, just activate the check box in front of the field *Name* and click on *Search*. All registered users are shown. You can create the export file with a simple click on *Save to CSV*. You will find this file in the program folder of Call & Track in the subfolder *EXPORT*. The following screen is shown:



- Enter the name for the Export file and finish the export with a click on Save.

- The generated CSV file uses the semicolon as seperator. If you want to change the separator, go to File then Server Setup, there you find this setting. A detailed description you find under chapter 5.1 in this manual

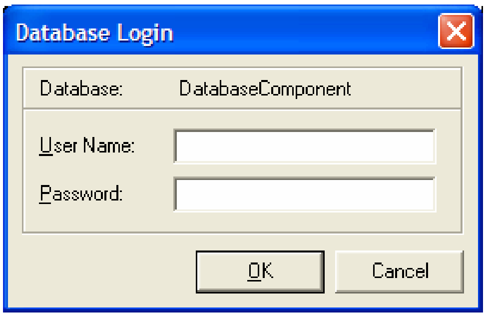
Please note, that the function *Export User* only exports the personal data from the user screen. If you wish a complete list of all licensed products by each user you need to activate the check box Include Products before creating the export file. Call & Track then attaches the entire list of licensed products including the serial numbers to every user's record.

5.7.2 Import of User data

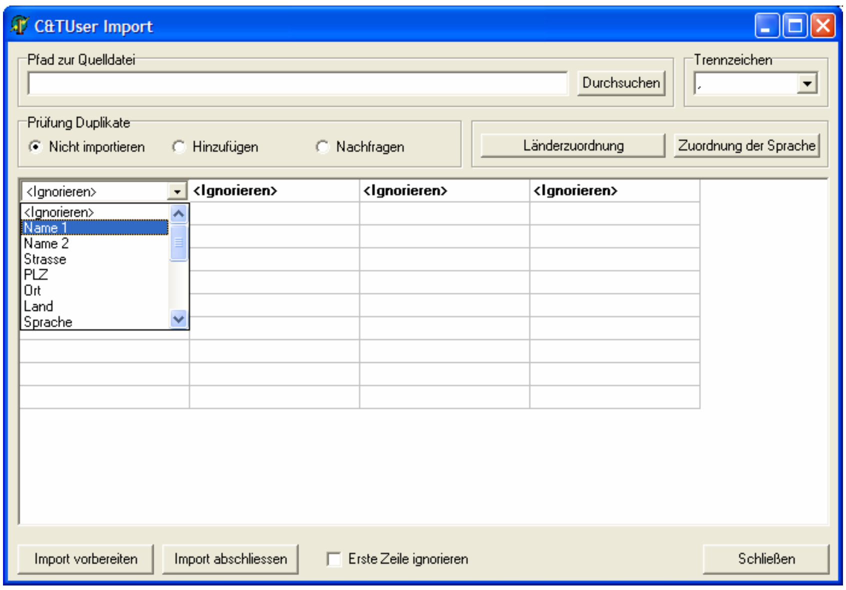
This option allows you to import Call- & Track user data. Therefore *a CSV* is taken over, which can be placed in Microsoft Excel or in another standard data base.

You can import User data this way:

- Choose the option *Import User* in the menu *Transfer* and log in with your user name and password:



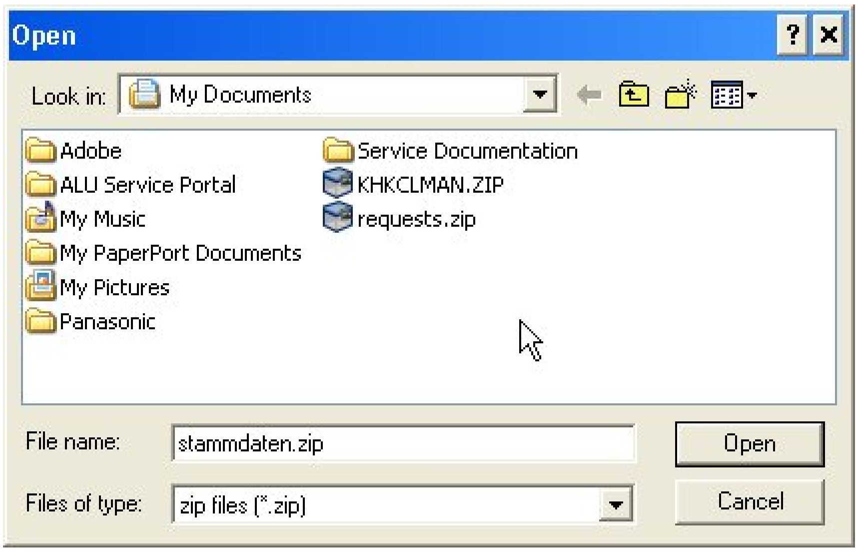
- After selecting the import file choose the delimiter as well as the appropriate choice regarding the handling of duplicates. You can fix country and language settings here. Throughout the pulldown fields the imported data can be clearly assigned. The first line of a table (column heading) can be left out if necessary.



5.7.3 Export and Import Base Data

This option is already described in Chapter 3.5.12.

Additionally to that you can find here the image for Import of base data:

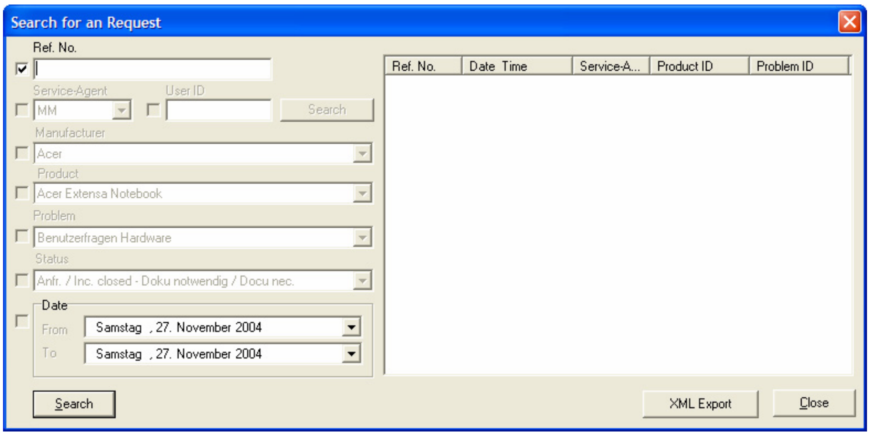


5.7.4 Export and Import of Requests in XML-Format

This option allows you to export and import Call- & Track request data. Therefore a XML file will be created or loaded.

This is how you can export your request data:

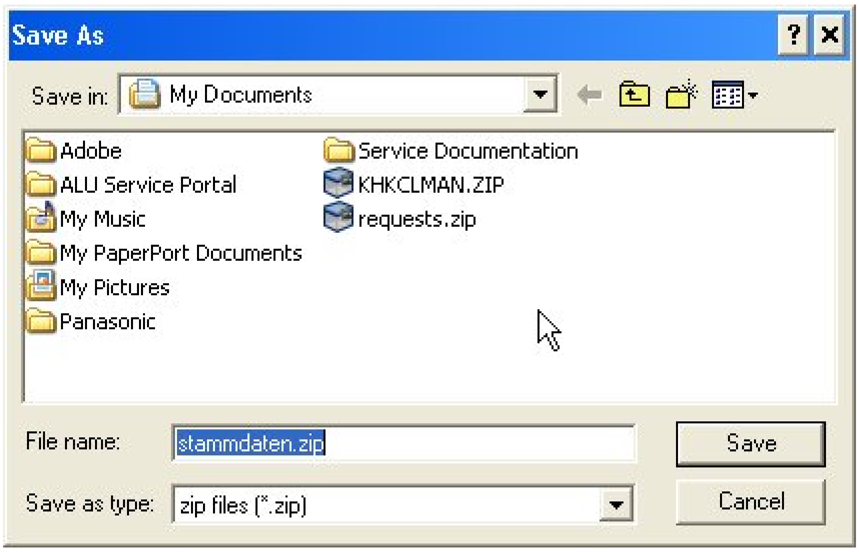
- Choose the option *Export Requests (XML-Format)* in the menu *Transfer.* After that appears a well-known window:



- Choose a special call or a group of calls using Selection criteria.

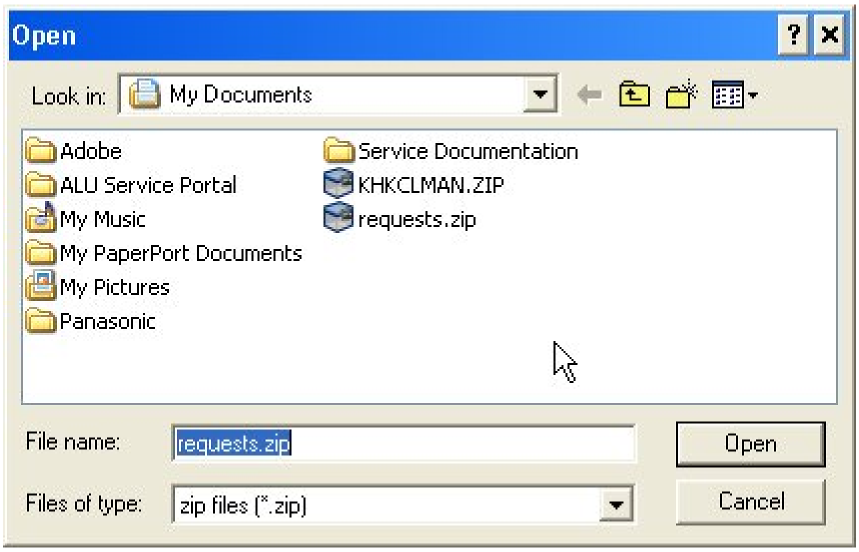
- If you want to export completely all the requests, deactivate all the Check-Up ticks and click on the *Search* button. You'll be shown all the registrated requests in the Data base. Mark them now and by clicking with your mouse onto the „*XML Export*“ button, you can create an export file. You can find this file within Call- & Track program catalogue in the subdirectory „*EXPORT*“.

- Type now a wishful name of the export file and close the Export on clicking on the button „*Save*“.



This is how you can import your request data:

- Choose the option *Export Requests (XML-Format)* in the menu *Transfer*. In the shown up window select an import XML-file.

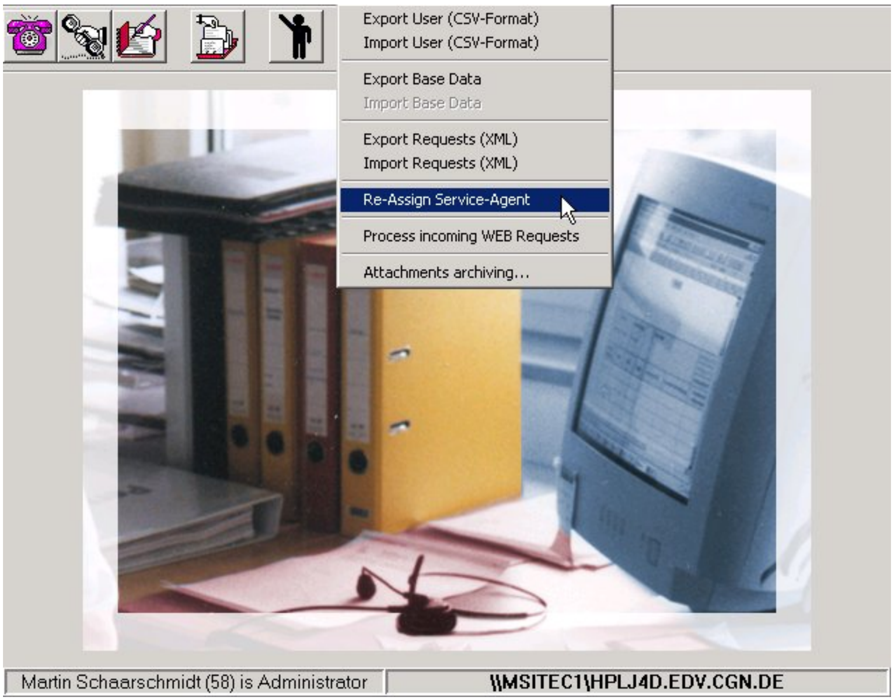


5.7.5 Re-Assign Service-Agent

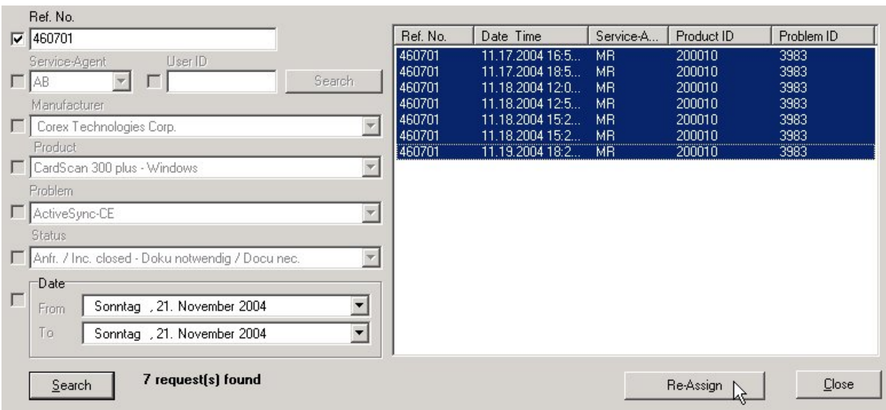
This option allows you to assign a different Service-Agent of Call- & Track.

This is how to transmit call data to a new Service-Agent:

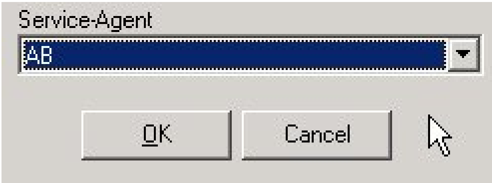
- Select the option *Re-Assign Service-Agent* in the menu *Transfer.*

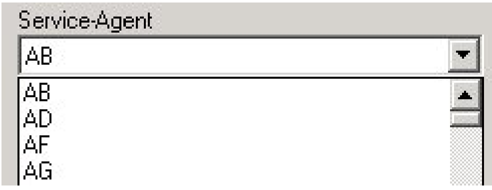


- Choose a special call or a group of calls using Selection criteria, select the appropriate data sentences and select them on pushing on *Re-Assign* button.



- After that select the appropriate Service-Agent and close the new setting with the click of *OK* button.



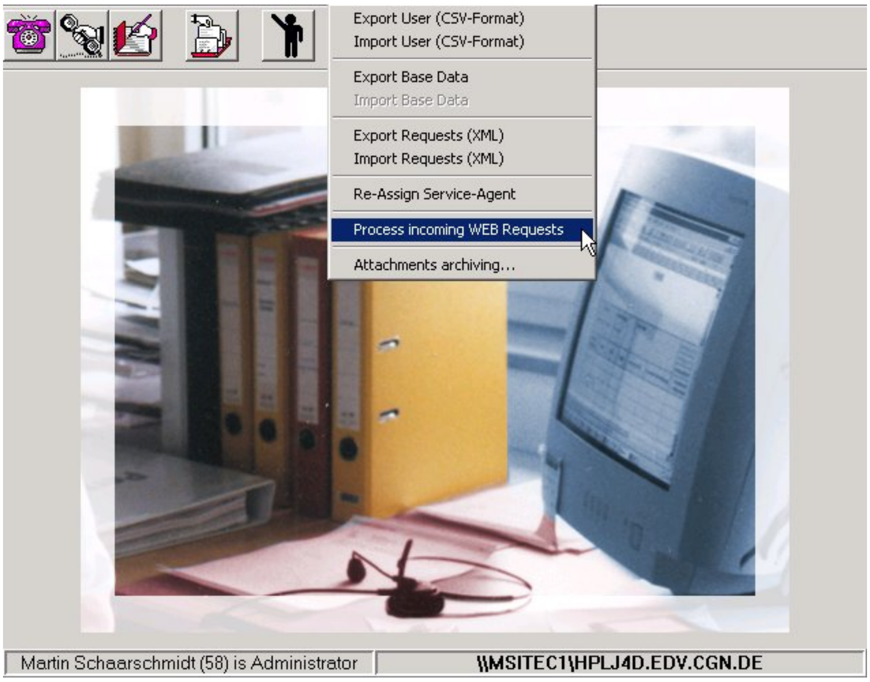


5.7.6 Process incoming WEB Requests

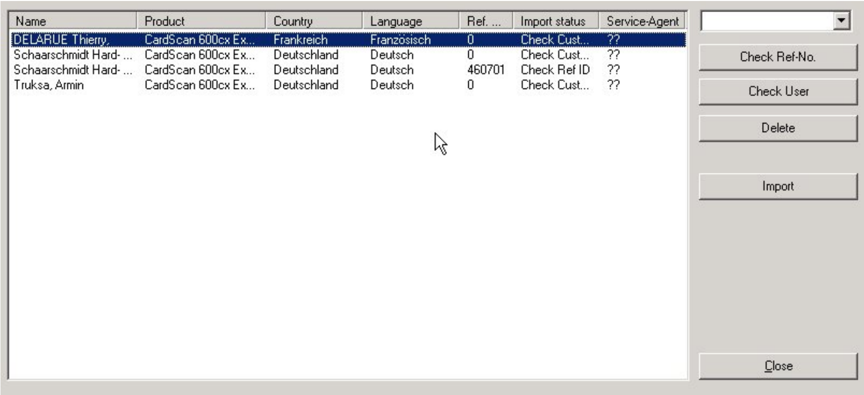
This option allows you to check or to delete incoming WEB Requests in accordance with the known reference number or customer ID. A further possibility of editing the request and at the same time of assigning a technician will be improved.

You can check the incoming WEB requests and assign them to a user as follows:

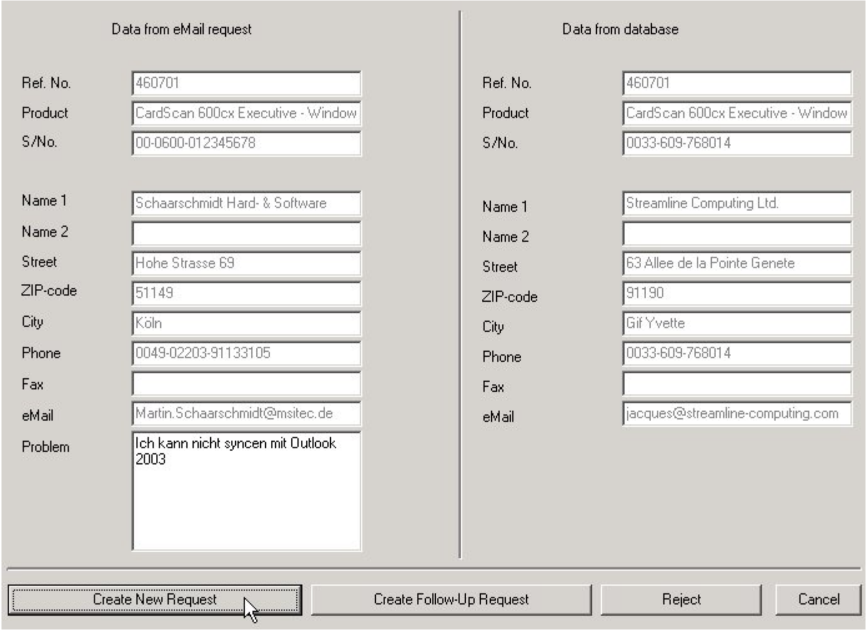
- Choose the option *Process incoming WEB Requests* in the menu *Transfer*.



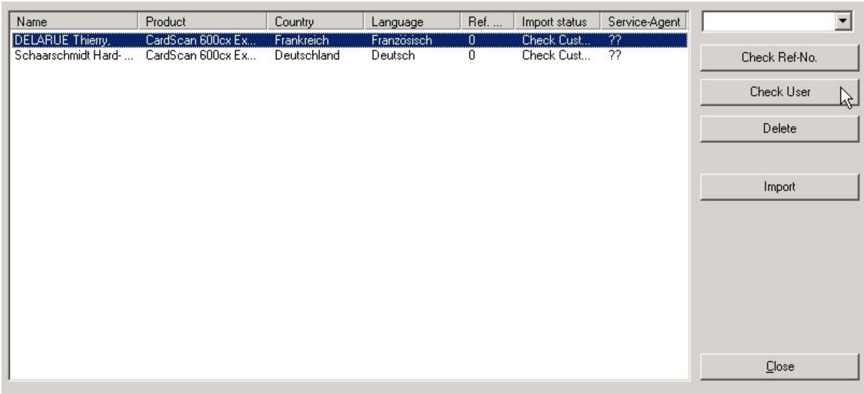
- In the output window select the request to be checked.



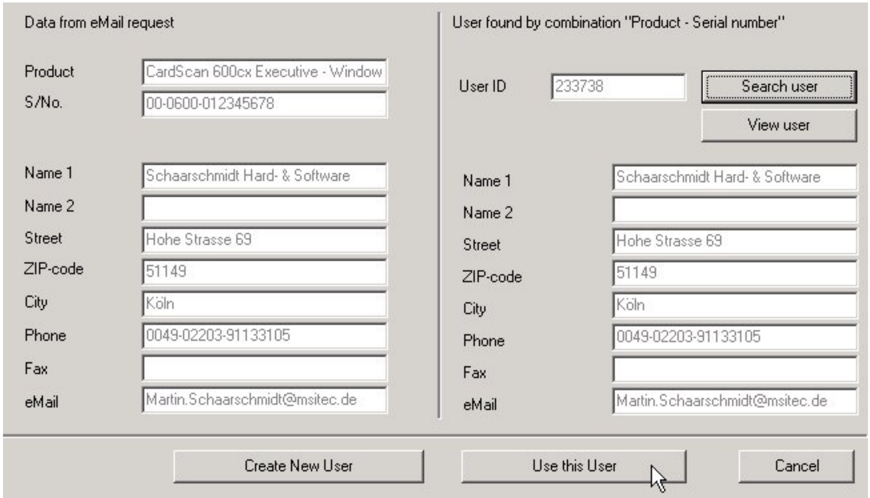
- The indicated reference number of the WEB request compares then the stated screen output to an available data of the database. Differences are easily distinguished and you can *Reject* the request. Consequently you have a possibility to *Enter a new Request* or to *Take existing Request.*



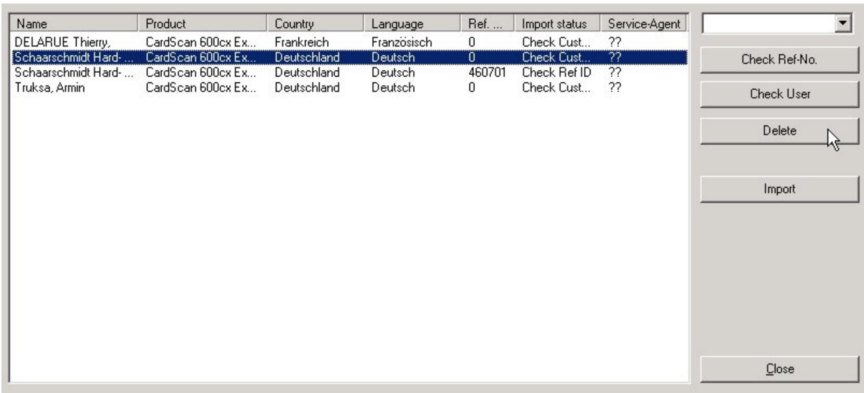
- With the button *Check user* you can verify if he is already in your database.



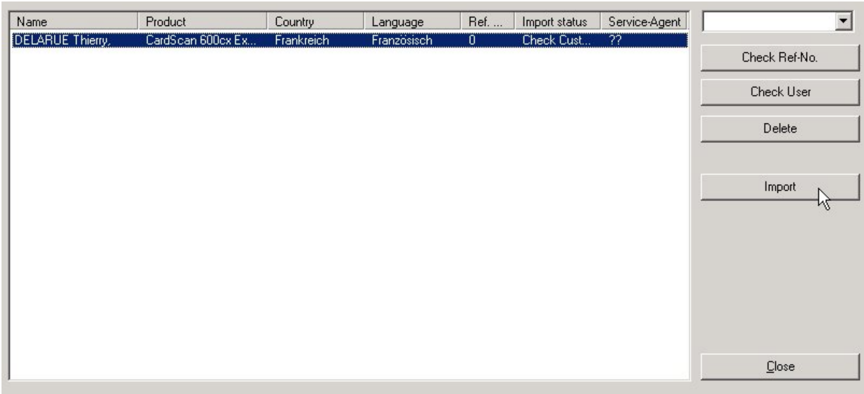
- The indicated data of the WEB request compares then the stated screen output to an available data of the database. Accordingly you can *Select a user* or *Enter a new user*.



- You can delete a WEB request on pushing on the button *Delete*. You can *Import a request* with the button Import.

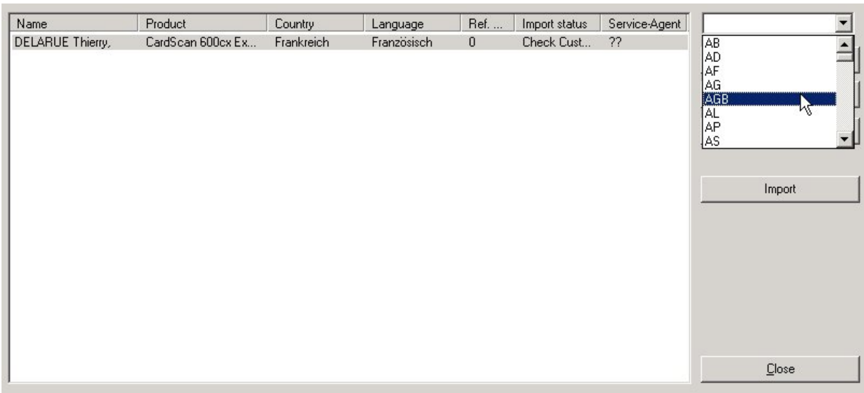


- The following screen output only appears if you didn’t assign a valid user to the import request.



- The following screen output only appears if you didn’t assign a valid user to the import request.

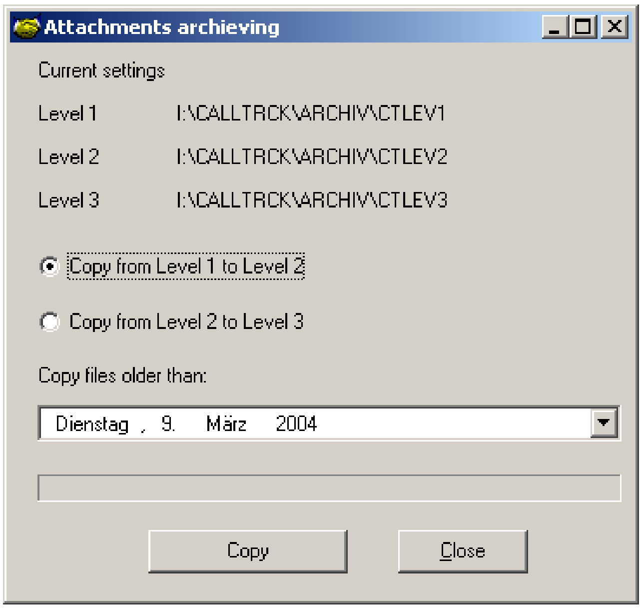
- The assignment of a valid user is carried out throughout the Pulldown Menu as you can see in the following screen.



5.7.7 Archive of the Attachments

In principle you can attach an unlimited number of documents to a request. These are called ***Attachments*** within Call- & Track. Attachments are collected centrally within the archive subdirectory. The more attachments are stored within the archive list, the slower searching or attaching new documents can be, due to the standard file handling of Microsoft Windows. In particular a slow insertion of new attachments can develop negative in the treatment of a request. That's why, we offer you with this function the possibility to move older attachments (that are not needed every day) into a folder so that you can work fast and efficient and have access to any saved attachment without knowing on which level the requested attachment is stored.

Moving attachments into a different level is very easy:



As you can see in the screen above, the archive has three levels. You can move all attachments dated older than the date entered into the next level. The attachments which are being worked on are automatically stored in level 1.

If you have moved a specific attachment into level 2 or level 3, Call & Track is still able to find and open this attachment automatically by using the corresponding buttons in the *Edit Request* window. Only the duration of the

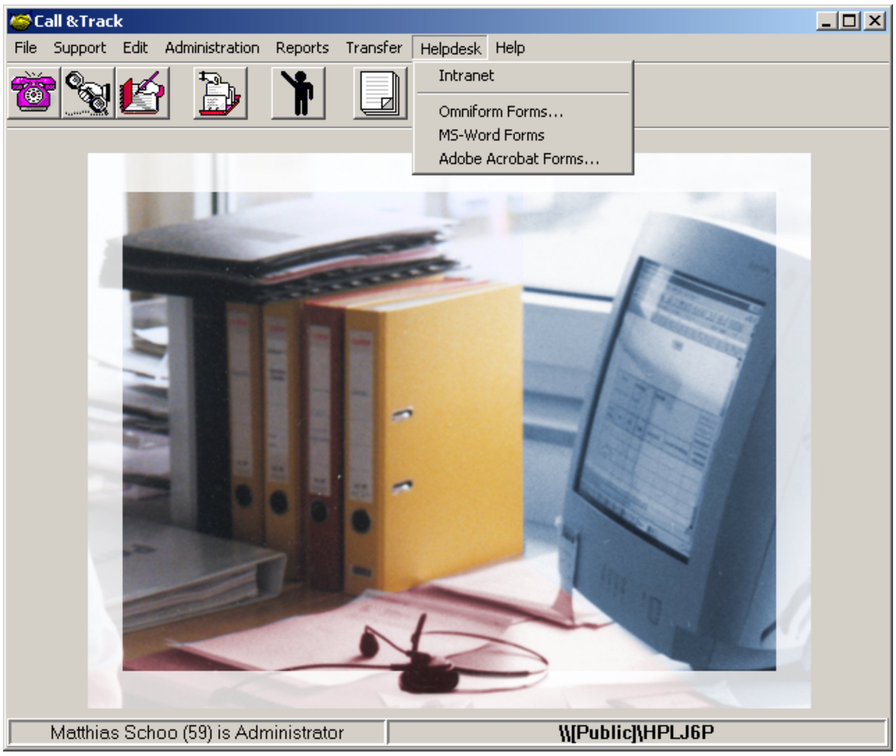
search may take 2 – 5 additional seconds until the attachment is found and opened.

We recommend you to use this function, however, first from a number of approx. 3000 Attachments within level 1.

5.8 Helpdesk

Via the menu Helpdesk you have very quick access to the Intranet information and to the forms. The Helpdesk function consists of the following components:

- Intranet
- OmniForm forms
- MS Word forms
- Acrobat forms



5.8.1 Intranet

With this function a direct link can be built up between Call & Track and an Intranet based knowledge data base or an Intranet based Support information service respectively.

The only thing the user has to do is to set up the respective reference calls of the web service and the start path of the local browser within the setup option *Local Setup* of the menu *File*.

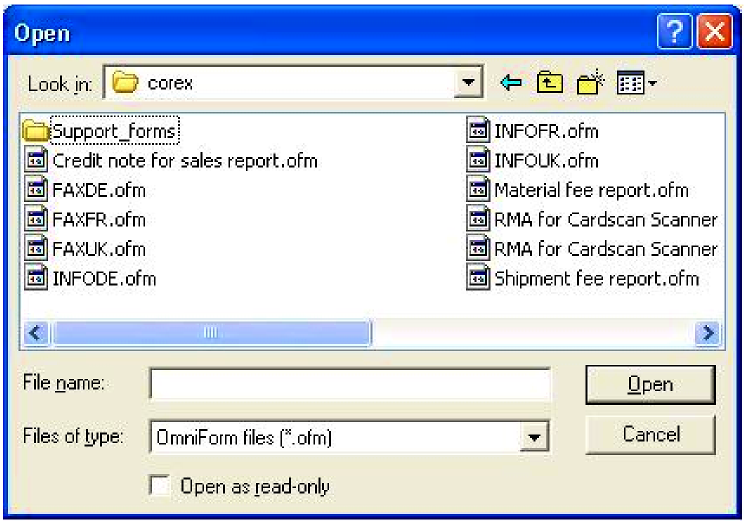
With an easy click on this function the web service within your Internet browser is automatically started and will be displayed on the screen.

- OmniForm forms,
- Microsoft Word forms
- Adobe Acrobat forms

All kinds of forms of the named applications OmniForm by Scansoft Inc., Microsoft Word and Adobe Acrobat, can be opened from Call & Track directly.

Here it is important that the respective reference paths and start directories were entered correctly within the setup function *Working Place Setup* in the menu *File*.

If you select one of the form options, the following window for file selection opens and shows the start list defined by you:



To open a form, highlight the corresponding file name and click on *Open*.

6 Multi User Environment

Call- & Track 5.0 offers you two options for Multi User Environment. First of all you need an additional user license for every registered Service Technician in Call- & Track, so that all upcoming Service-requests can be assigned without fail to the Technician dealing with it. Secondly the additional Multi User License offers you the possibility of working with the Call- & Track database from different Client PC's in Peer-To-Peer or LAN-network.

In the following sections we will explain the systematic extension of your Call- & Track database for Multi-User Use from many different workstations in your local network.

6.1 Add an additional user license

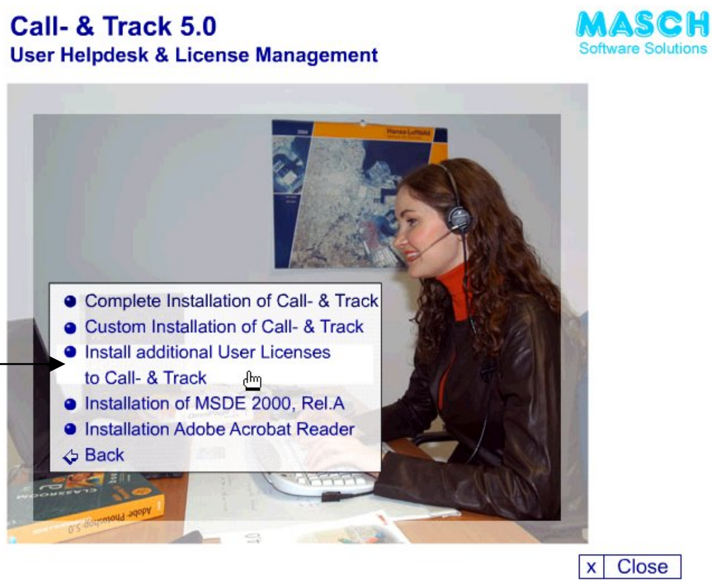
The Call- & Track License Administration connects the registration of additional Service Technicians by entering the appropriate serial number licenses.

You can purchase the additional serial numbers as 1-user or 5-user licenses later. Please note that Call- & Track 5.0 supports a maximal license size of 1+10=11 user licenses.

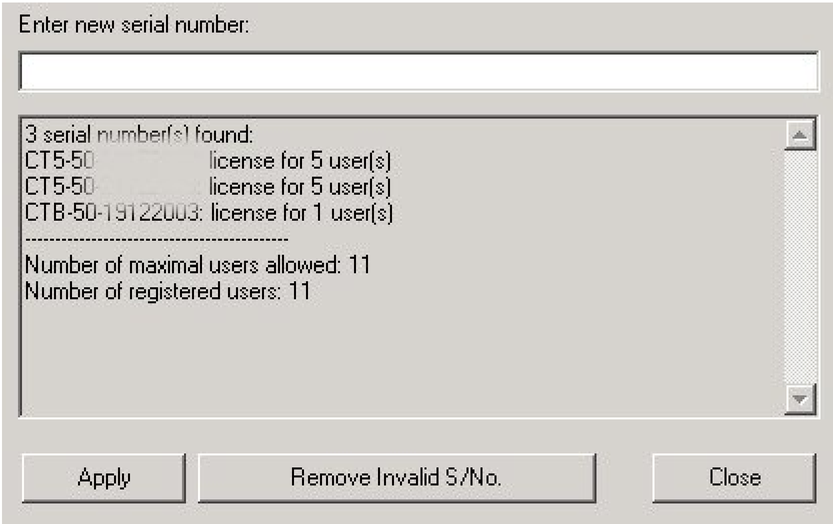
You can order the Call- & Track licenses throughout authorized specialized dealers or the Customer Service of OOO MASCH Russia as E-License.

The installation of the additional user licenses is processed over the installation procedure on the Call- & Track 5 program CD. Please insert program C and the installation procedure is automatically starting itself. Choose the following marked option.

Marked
Option



You are now starting the license administration pool of Call- & Track 5 and the following screen is shown:



Within the above shown screen you are provided with 3 functions for the administration of additional user licenses:

6.1.1 Add a new serial number

The data entry of the additional serial numbers, is designed extremely simple.

At the same time it will check the validity of the serial number, which you have entered: 

6.1.2 Deleting the invalid serial number

This function is on standard greyed out, since it is only used for service maintenance on system and serial number upgrades.

6.1.3 Close the Call- & Track user administration

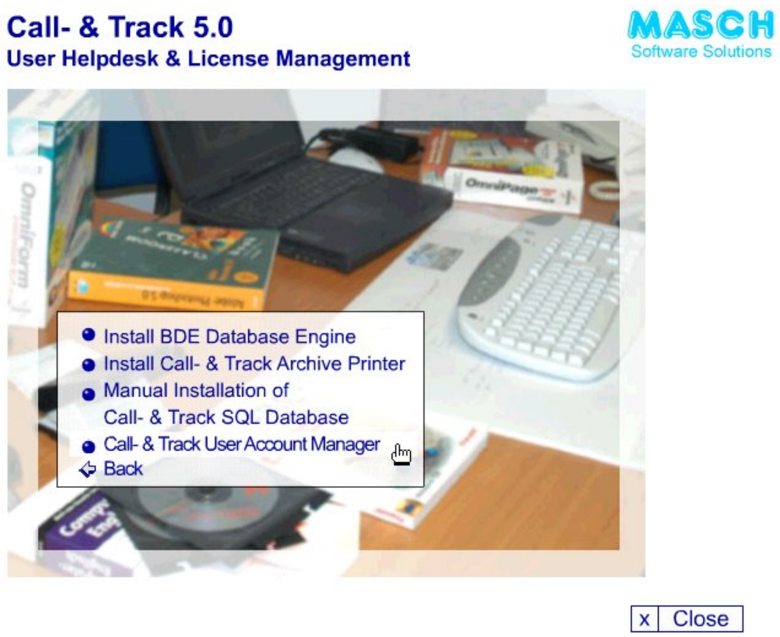
By clicking on the button „Close”, you can finish the license administration tool of Call- & Track automatically and return to the Call- & Track installation program.

6.2 Call- & Track user administration

The Call- & Track user administration offers you, based on the license administration, the setup of an adequate number of service technicians. Up to a number of 5 technicians the number is to be treated equivalent to the entered license numbers.

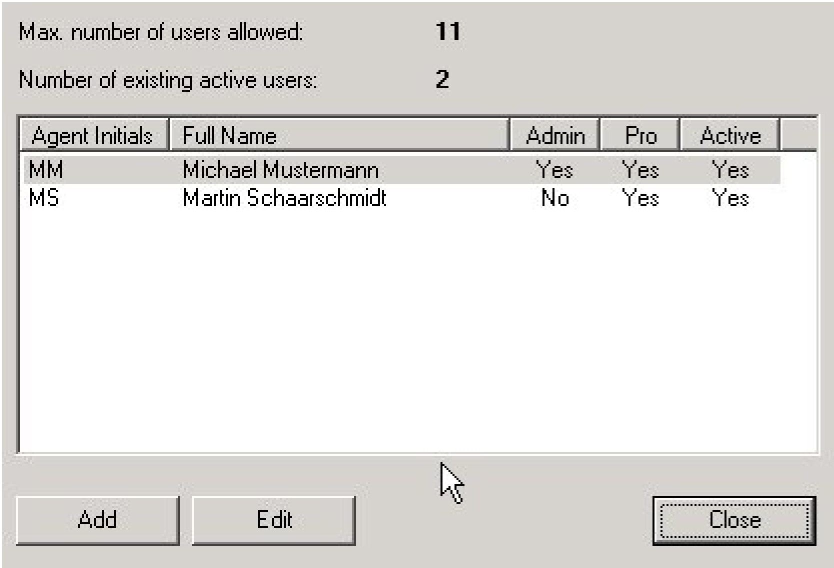
On a license size of more than 5 licenses, Call- & Track offers you the setup of additional so called "inactive" service technicians. This way the administrator has the possibility to administrate more service technicians than the maximum number of user licenses. The user administration gives him the possibility to mutual activate or deactivate the necessary service technicians as you can see from the following sections.

After you have now installed the additional user licenses as explained in section 6.1 please start the function Call- & Track user administration:



You will find the application for the user administration within the installation program in section „**Custom Installation of Call- & Track".**

You are entering now the user administration of Call- & Track 5 with what you can setup, activate and deactivate the individual technicians:

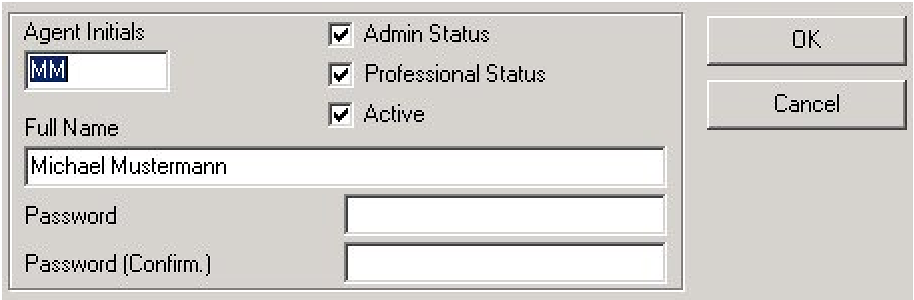


Attention!!!

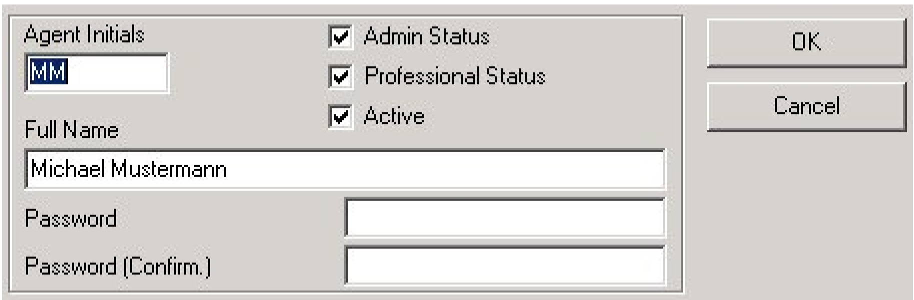
If you miss here the function „Delete a User“, it is of course understandable but in this case correct, because there is no such function. A once setup service technician you cannot delete later on, since otherwise all request tracked by the service technician would not have any source and the database would be inconsistent.

Leaving service technicians that will be replaced within the database by a new user have to be switched to “inactive”. This we will further explain in this section.

Now click on the button „Add“ and the user administration mask for a new service technician will be opened:



- In the field „Technician ID“, please insert, with 3 letters maximum, the initials of the service technician. These initials are used by the service technician as user name when logging in as well as on personal identification of the processed requests.
- Under „Full name“, please insert first and last name of the additional service technician.
- Into the field „Password“, you should enter the password of the additional service technician. In the field below, you must confirm it a second time.



Important for the function of the service technician is now the classification as an administrator, professional user or standard user.

- As „Admin“ you grade all service technicians who are allowed to use the functions „Administration“, „Reports“ and „Transfer“ and thus are allowed to use the full amount of Call- & Track functions.
- As „Professional User“ there are some greyed out sub functions within the functions „Administration“, „Reports“ and „Transfer“ that are just meant for the use by the administrator of Call- & Track 5.
- Important also the last check-up field with the name „Active“. Throughout this function you can activate and thus give free for the login or deactivate a support technician. This should be processed especially when a retired service technician is to be replaced without willing to raise the number of user licenses for the same time access. Please note the information for deleting a service technician on the previous pages of this chapter.

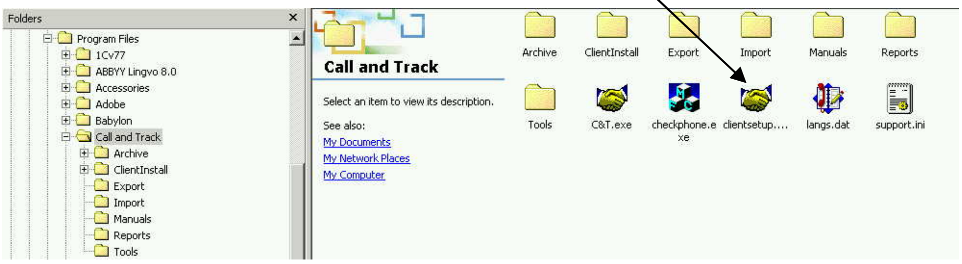
By clicking on the button „OK“, you can finish your submission and save them, so that the new and the edited data entries regarding the service technicians can be used right away after closing the user administration tool.

6.3 Preparation of an additional Client PC for C&T

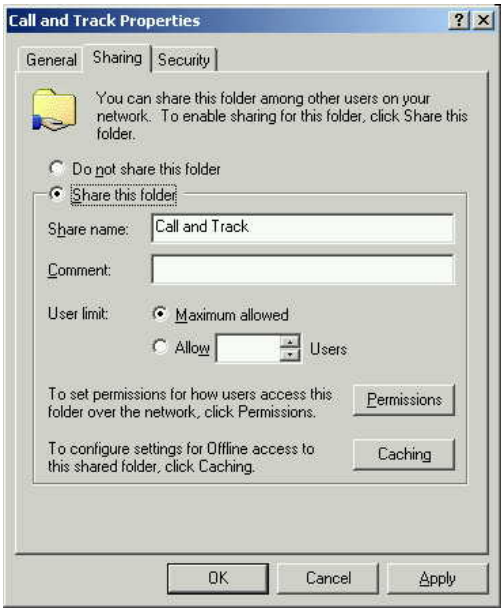
6.3.1 Release of the Program Directory on your server PC

Independent of whether you would like to install Call- & Track 5.0 in a Peer-To-Peer network or on a dedicated file server, you have to process the basis installation according to the instructions of the installation manual in connection with the installation of Microsoft MSDE 2000.

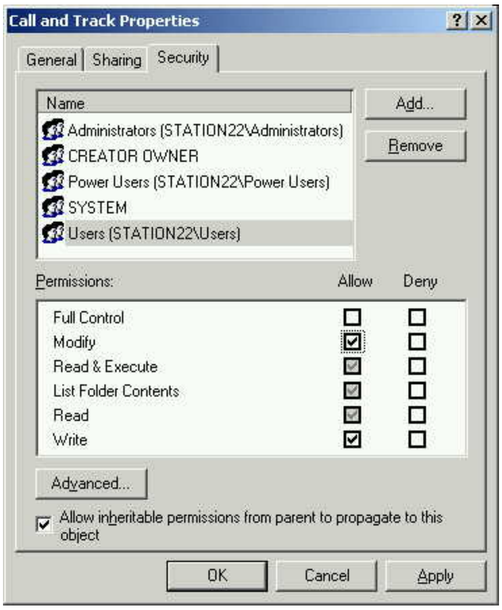
After the successful base installation, you will find also, as you can see from the screen below, the utility program "*ClientSetup.exe*" within the Call- & Track program directory:



Set up in the first step a sharing for your Call- & Track Program Directory so that you can launch the Client Setup Program from each additional Client PC's:

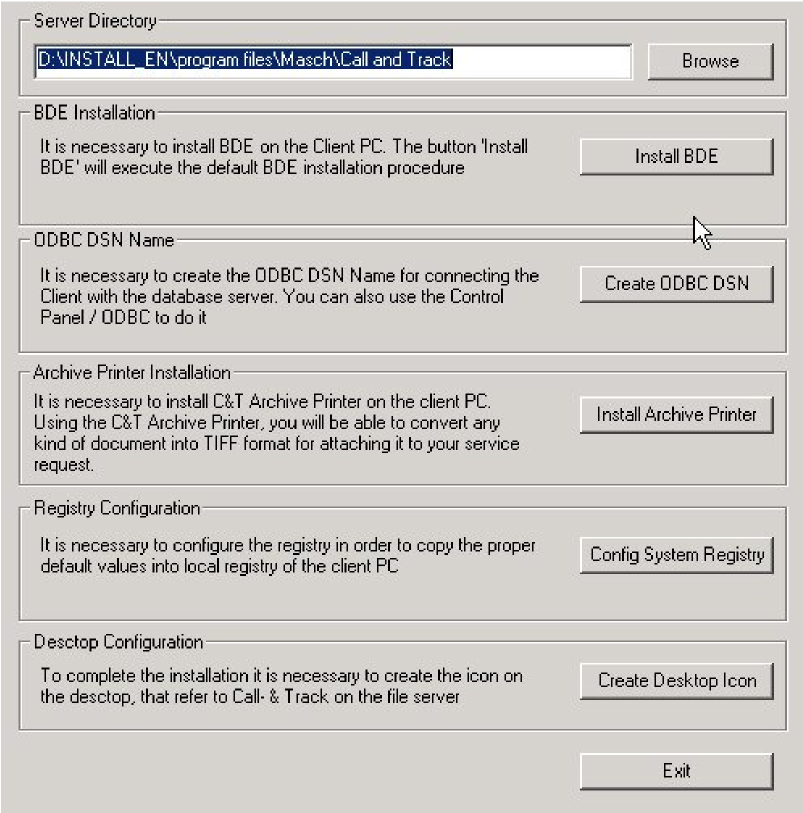


Please complete the Sharing Setting for the Call- & Track Program Directory with „Apply" and click on the tab "Security" where you can grant the Call- & Track users as shown in the screen below the proper rights as follows:



6.3.2 Starting the Client Setup program

After the successful setup of your server directory, you can now install from each Client-PC, for which you have a valid additional multi user license, the Client Setup Program. You enter then right away the following installation screen:



Process now every single installation step according to the button order on this screen.

After the successful processed Client installation you are without any additional work able to use Call- & Track from your workplace.

Please note that you may install Call- & Track 5 Client on as many Client PC's as you want, but the integrated Call- & Track license administration accepts only the same time access of the licensed number of active users.

The first step of the installation for an additional Client PC of your Call- & Track application is as shown below to insert the above explained server directory.

It must be entered into the data field "*Server Directory*":

Afterwards executing the following function buttons processes the configuration of your Client PC step by step:

The installation of the BDE has to be processed on every workplace and will be filed locally. The button "Installation of the BDE" executes the standardized BDE installation.

The ODBC data interface has to be prepared for a functioning connection to the data base server. You can process this also over the function data springs ODBC in the computer administration of your operating system.

The Call- & Track Archive printer is a virtual printer driver, which makes it possible for the user to convert any document in TIFF-Format, so that it can be attached to the request.

It is necessary to update the Windows Registry database for Call- & Track on each Client PC, by that the standard allowances are tracked fully for every Call- & Track workplace.

To finish the installation you will need a program icon on your Windows Desktop, so that you can start the Call- & Track application from your server drive easily.

After the successful and full execution of the Client installation steps you can orderly finish the Client setup program throughout the button „Exit".

A System Requirements

We distinguish between the following system requirements for the application:

- **Client Area**
- **Backend Area**

A.1 System requirements for the Client Area:

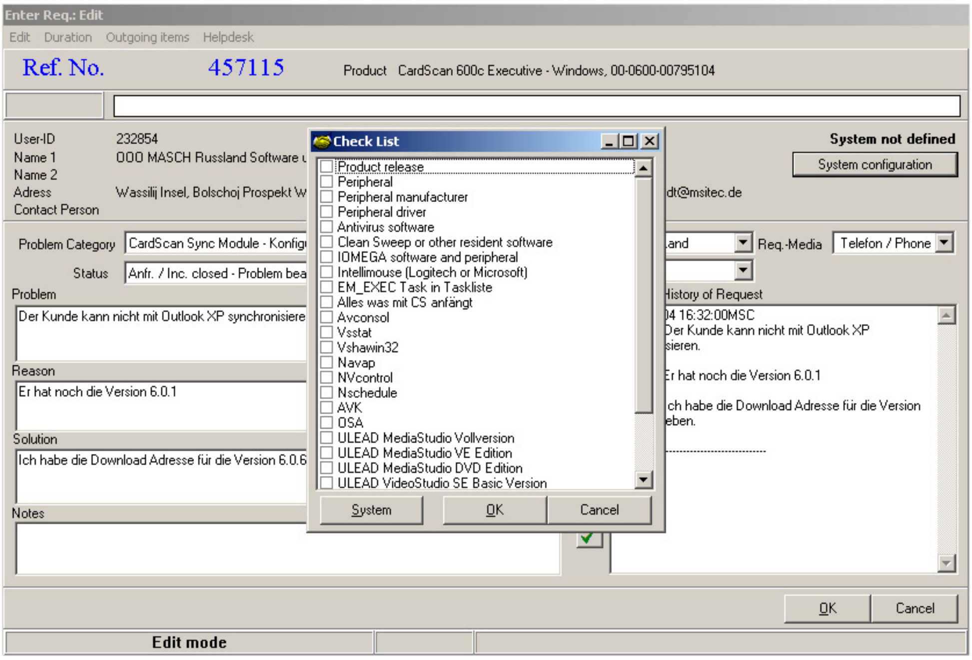
- PC with Pentium III 700-Mhz processors or faster (recommended).
- Operating system Microsoft Windows NT with service pack 6a, Windows 2000 with service pack 3 or Windows XP Professional or higher.
- For Windows NT, Windows 2000 and Windows XP Professional:
    - 256 MB of RAM (512 MB recommended) for the operating system as well as, in addition, 8 MB RAM for every application which is open at the same time
    - 20 GB of available hard disk memory with 2 GB on the hard disk where the operating system is installed (the necessary storage space depends on the configuration; user-defined installations may require more or less free storage space on the hard disk).
- CD-ROM disk drive
- Super VGA-Monitor (800 x 600) or monitor with higher resolution and with 256 colors
- Microsoft Mouse, Microsoft IntelliMouse or compatible device.

A.2 System requirements for the Backend Area:

- PC with Pentium IV 1800 MHz processors or higher (recommended).
- Operating system Microsoft Windows 2000 or Windows 2003 server with current service pack.
- Microsoft SQL server in 2000 with suitable CAL-license number.
- For Windows 2000 and Windows 2003 server:
  - 512 MB of RAM (1,024 MB recommended) for the operating system
  - 60 GB of available hard disk memory with 4 GB on the hard disk where the operating system is installed (the necessary storage space depends on the configuration; user-defined installations may require more or less free storage space on the hard disk).
- CD-ROM disk drive
- Super VGA-Monitor (800 x 600) or monitor with higher resolution and with 256 colours
- Microsoft Mouse, Microsoft IntelliMouse or compatible device.

B Tips

How to change the fixed implemented check list within the screen: “*Enter Req: Edit*”?

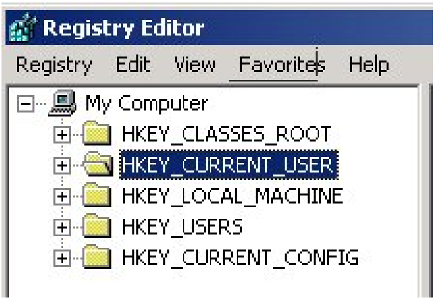


Attention!

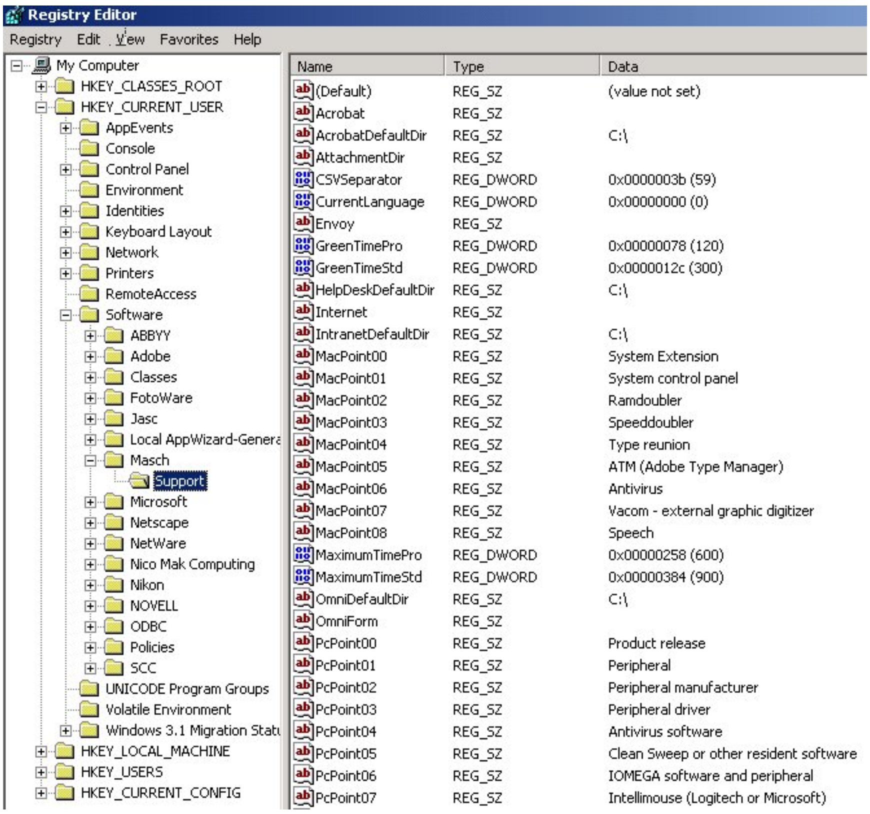
The treatment and/or adjustment of this check list is not trivially possible by menu extensions, since the check list is deposited fixed in the registry of your Windows operating system. For the treatment of the check list entries in the registration data base of Windows you need founded knowledge of your used operating system. We can explain the necessary changes at an example to you indeed in the following, please deduce from it no functional assent for your Call- & Track Installation or in particular for the flawless functionality of your operating system, should there be a false function or installation damage in your Windows due to inappropriate treatment of the registry. In particular in the multi-user environment you must pay attention to the fact that changes you did in the registry of on PC are also carried out on all other PCs which are linked with Call- & Track because otherwise inconsistencies in the treatment can occur.

Here now the explanation concerning the check list care:

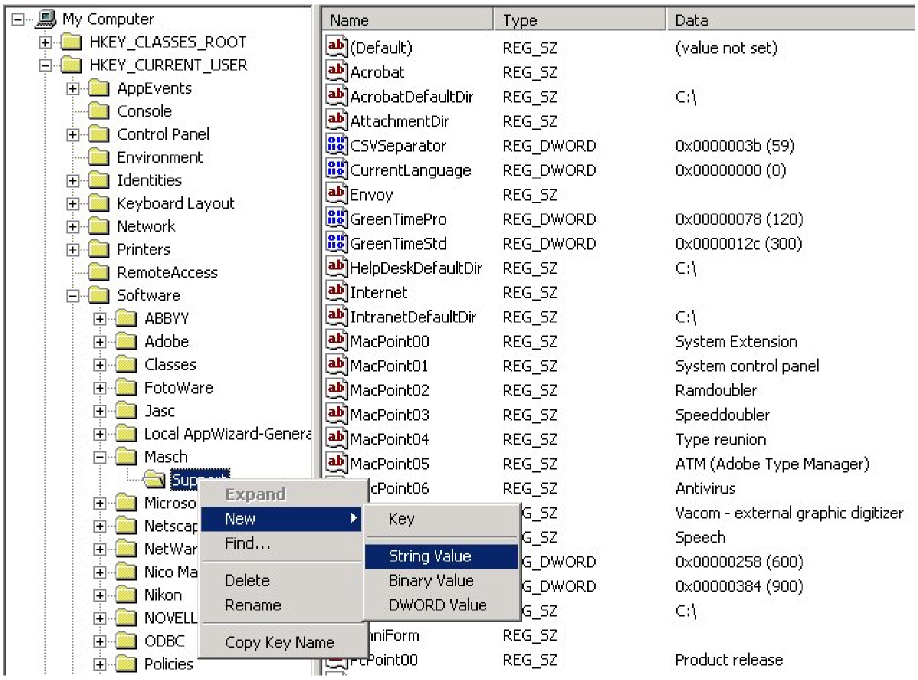
- Start your Windows registry editor via *Start -> Run*. Type in the following command: *REGEDIT.EXE* and close the screen by pressing ENTER. The following window opens:

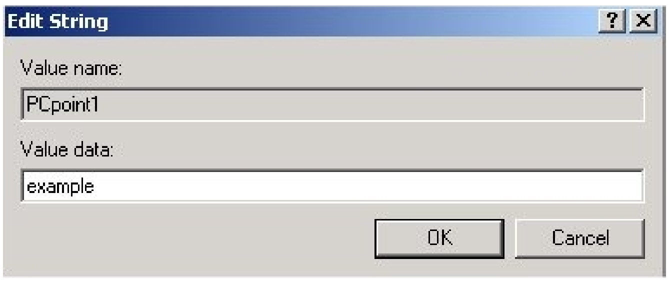


- Open the folder *HKEY_CURRENT_USER* and the subfolders as shown in the following screen:

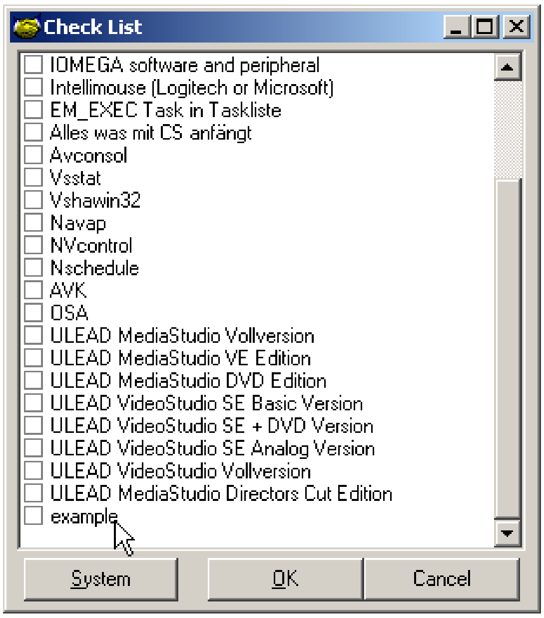


- You find in the segment "MASCH" on right side of the screen the entries corresponding to the check list PcPointxx or MacPointxx. The letters xx stands as a numerical place holder for the list of the single entries. Please enter now a new PC check point, while you proceed like shown in the following screen. Open with the right mouse the context-sensitive menus of the registry editor and create a new String Value:





- At the end you start your Call- & Track application again and open the check list screen within the window: “*Enter Req: Edit”* and you will find the newly created entry now in your check point list:



C Links in the Intranet

C.1 Our Partners

On these sides you find our professional trading partner firms which you will gladly inform about Call- & Track:

- **http://www.masch.com/partner**

C.2 Our Reference

Please visit one of the following Web Sites:

- **http://support.masch.com**
- **http://www.masch.com/products**
- **http://www.masch.com/tucos**